

PASTRY ALLIANCE

Greetings from
**RICHMOND,
VIRGINIA**

AMAZON HQ2 SUBMISSION | OCTOBER 19, 2017



GREATER RICHMOND IS

**A STRATEGIC LOCATION WITH ADVANTAGED ACCESS
TO THE REGION'S DEEP BENCH OF EXEMPLARY TALENT**

**A VIBRANT, DIVERSE, CULTURALLY RICH REGION
THAT ATTRACTS AND RETAINS TALENT**

**A WORLD-CLASS QUALITY OF LIFE AT
A FRACTION OF THE COST FOR AMAZONIANS**

**AN INNOVATIVE, LOW-COST BUSINESS ENVIRONMENT
IN AN EXCEPTIONALLY WELL-MANAGED STATE**

**A REGION AND STATE WITH THE SPACE AND WILLINGNESS
TO INVEST IN ACCELERATING AMAZON'S GROWTH**



THE CASE FOR GREATER RICHMOND

With HQ2, Amazon is once again positioned to pioneer and grow an already global company at the forefront of innovation. We understand that you need talent, an attractive location, a compelling property with space to grow, and a competitive business climate to build your company. In Greater Richmond, you will find a long-term partner that meets those needs and is ready to grow with you.

Strategically located in the heart of Virginia, Greater Richmond is already capitalizing on its unique combination of affordability and high quality of life to attract the caliber of talent that Amazon is seeking. In addition to our high concentration of millennials, companies are flocking here, too, capitalizing on our strong business climate and low cost of doing business.

Once a region defined principally by its southern charm and history, Greater Richmond has grown into a thriving, dynamic, revitalized metro, revered for its natural beauty and lively art scene. Here,

Amazonians will find an unparalleled set of amenities, including diverse housing options that satisfy all preferences and budgets, easy commutes, access to a great K-12 school system, and an array of cultural, recreational, and outdoor activities.

Our story is one of ingenuity and growth. Our friendly business climate, political stability, and commitment to supporting our local businesses means that we're ready to support your growth, too.

Our innovative and entrepreneurial ecosystem will ensure Amazon finds the support it needs to test, validate, and advance existing and new areas of business. As a constantly expanding region, Greater Richmond is ready to embrace the influx of Amazonians, and we are poised to grow with you. As part of our vision for a shared-growth partnership, we will match your ambitions and invest in both Amazon's and our region's success.

In Greater Richmond, you will benefit from premier assets:

- **Strategic location with advantaged access to the region's deep bench of exemplary talent.** Our location and regional connectivity put us at the center of Virginia's unmatched talent pipeline. Virginia's public higher education system is the best in the nation, and our tech talent is growing at more than twice the speed of the national average (17% vs. 7%). Here in Greater Richmond, employers have recognized and praised our talent's quality and accessibility. We are within two hours of 72% of Virginians with a bachelor's degree, and two of the top six public universities in the country.

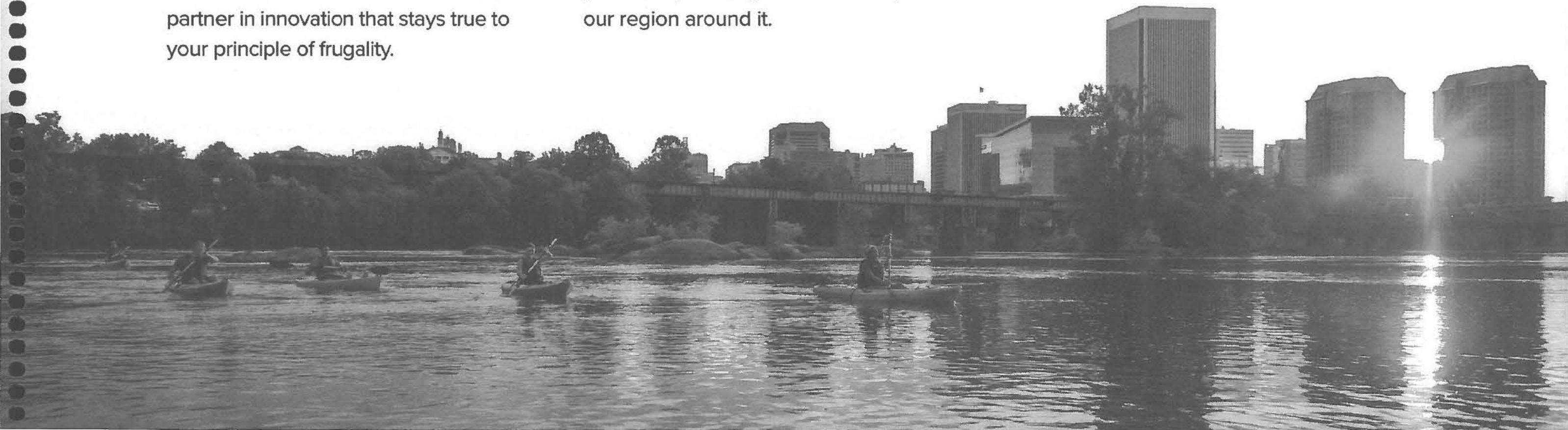
- **Vibrant, diverse, culturally rich region that attracts and retains talent.** We are an inclusive region, home to a diverse population (38% nonwhite) that speaks >38 different languages and is LGBTQ-friendly. We are also a region with character, thanks to our lively arts scene, acclaimed restaurants and craft breweries, and plethora of outdoor activities. Greater Richmond's recent revitalization is already attracting talent – we have the second-fastest growing millennial population in the country.

- **World-class quality of life at a fraction of the cost for Amazonians.** The price of a house in Greater Richmond is ~half the price of the same property in Seattle, and overall cost of living is ~5% below the national average. Amazonians will enjoy diverse housing options, high-quality school districts, safe neighborhoods, quality healthcare, and an easy multimodal commuting system – featuring the lowest traffic delay of any of the 46 very large and large urban areas in the U.S., and a significant expansion of a three-modal public transit system already on its way.

- **An innovative, low-cost business environment in an exceptionally well-managed state.** Greater Richmond and Virginia are consistently recognized among the best places to do business, attracting Fortune 500, Inc. 5000, and other high-tech companies, including many that have an existing Washington, D.C. footprint. With a stable, efficient, and innovative government administration and the potential for up to ~\$10B in savings on labor and rent compared to other regions over 10 years, Amazon will find in Greater Richmond a dedicated partner in innovation that stays true to your principle of frugality.

- **A region and state with the space and willingness to invest in accelerating Amazon's growth.** We are a dynamic, rapidly expanding region and want to grow with you. We have a proven track record and a forward-looking commitment to invest in the key components that support your growth and ambitions: talent pipeline, transportation infrastructure, and regulatory experimentation. Through our investments and commitments, Greater Richmond will be a home that allows Amazon to find your next pillar of growth and shape our region around it.

As Greater Richmond expands, we are ready to join Amazon in the next stage of your development as a company. With our access to high-quality talent, attractive lifestyle and character, low cost (for Amazon and Amazonians), and friendly business environment, we already have the fundamentals that make us an ideal region for Amazon to call home. Combined with our commitment to invest in Amazon's growth, you will have the space, capacity, and support to grow your company and our region.







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CONFIDENTIAL

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TALENT

Richmond is a magnet for talent. Drawing from the state's highly-educated labor pool and tapping into a wider, global base, professionals come to Richmond for its diverse business opportunities and educational assets and stay for its quality of life and community. To enhance talent development efforts in the future, we are committed to working with state and university partners to further grow and attract talent that meets Amazon's needs.





OUR WORKFORCE

Virginia's premier talent base and Greater Richmond's recent growth in talent production and attraction make for a world-class pool ready to meet Amazon's needs in all key employee profiles.

Across industries, Virginia's workforce is, and always has been, one of the most productive and educated populations in the country – 37% of the population has a bachelor's degree or higher, making it the seventh-most educated state in the country.

Specifically, Virginia and Greater Richmond are equipped to meet Amazon's human capital needs in the talent areas highlighted. Virginia's workforce is rich, with ~35k software developers, ~40k accountants and auditors, ~36k legal professionals, and ~170k people in management roles.

Greater Richmond contributes a significant portion of that statewide talent: 6,630 software developers, 7,420 accountants, 6,670 residents in legal occupations, and 26,830 residents in management occupations.

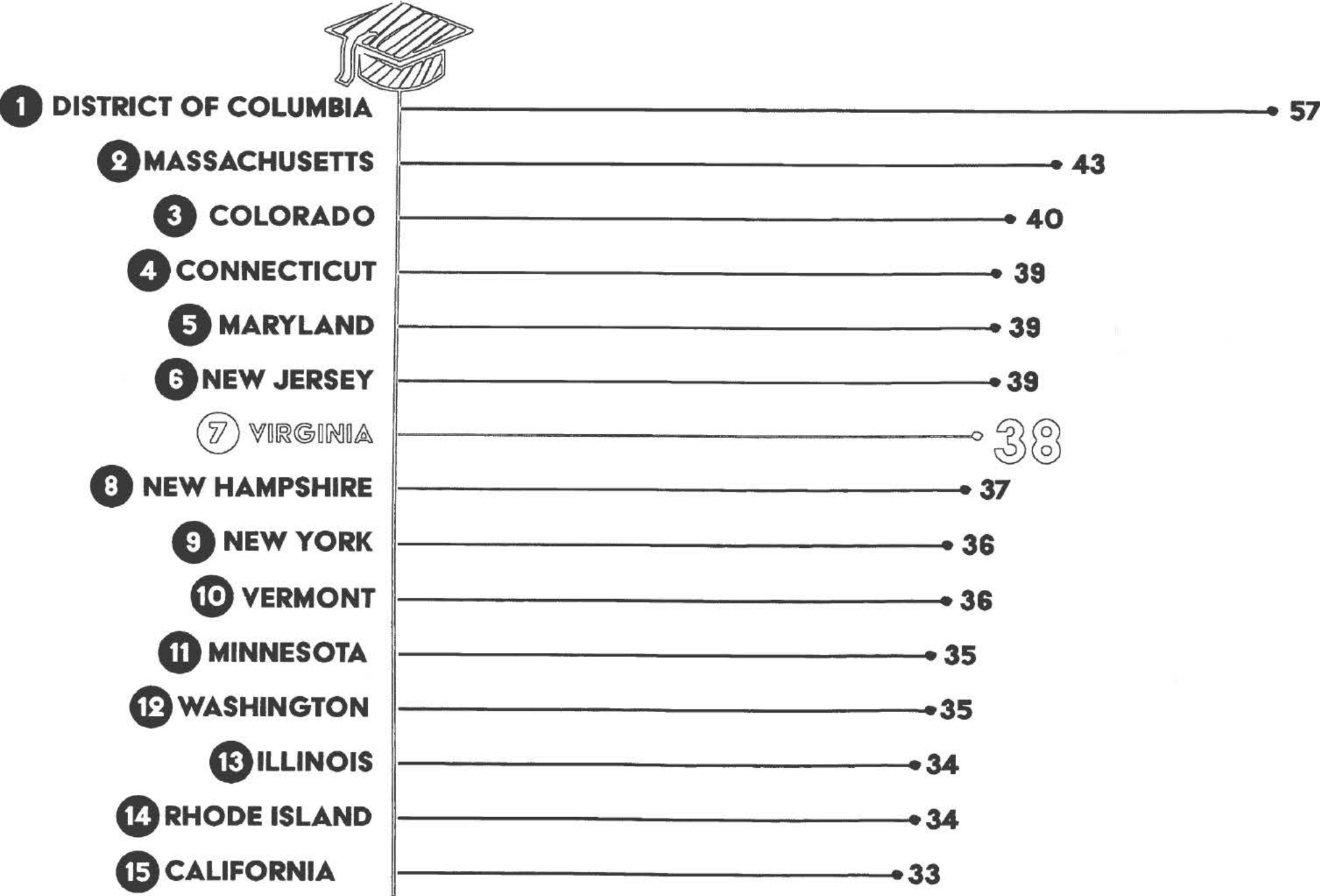
In tech in particular, we are well-positioned to supply Amazon with a deep bench of talent. In fact, Virginia has the country's single-highest concentration of technology talent.

A RICH TALENT POOL

EDUCATIONAL ATTAINMENT IN VIRGINIA IS #7 IN THE COUNTRY

EDUCATIONAL ATTAINMENT

% 25-64 YR. OLDS WITH BACHELOR'S DEGREE OR HIGHER



SOURCE: US CENSUS 2016



“*McKesson has benefited from the diverse talent pool in the Greater Richmond area. It has been a strategic advantage for us.*”

STANTON MCCOMB,
PRESIDENT, MCKESSON MEDICAL-SURGICAL DIVISION

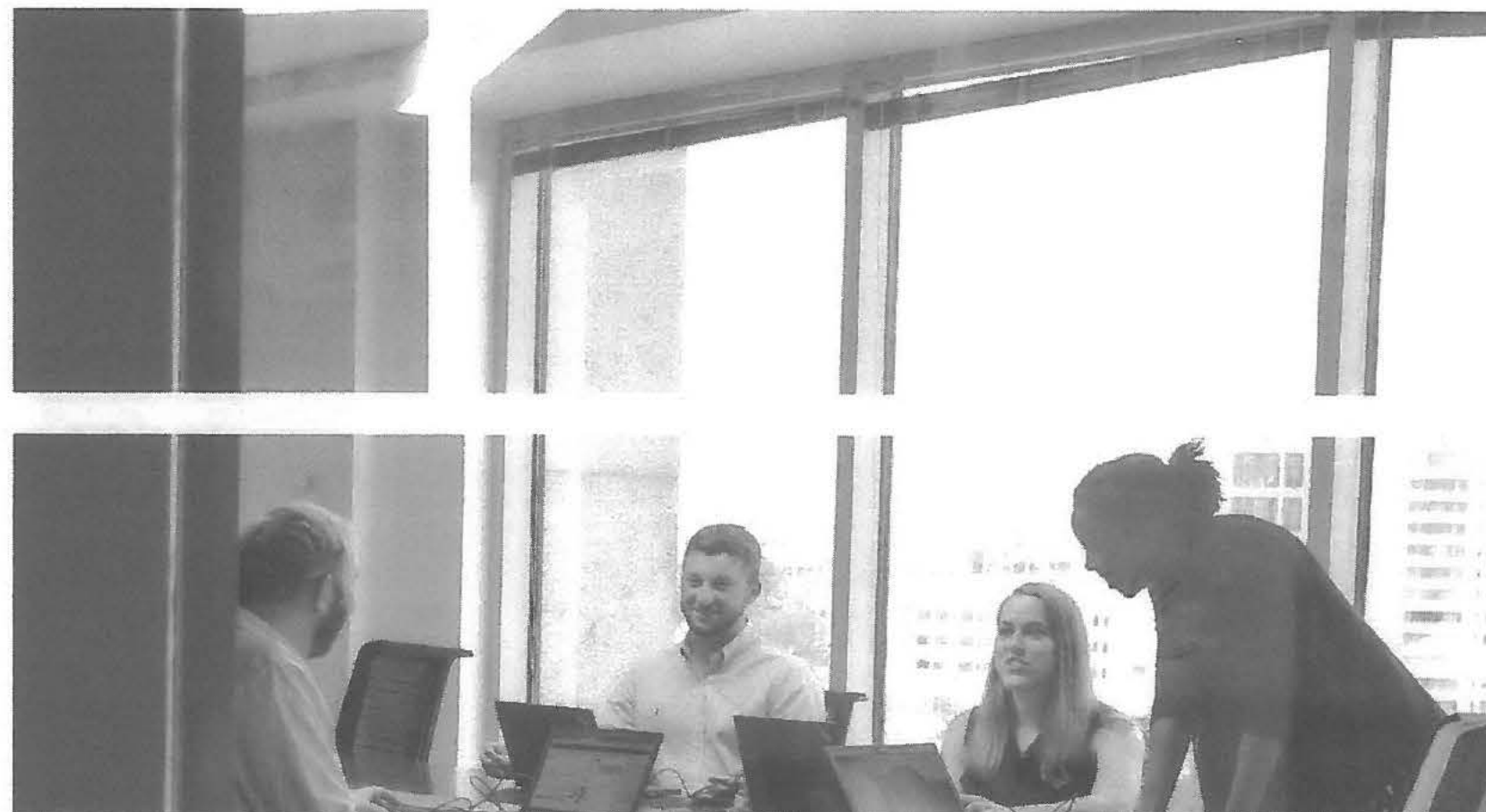


GATHER RVA

“We chose Richmond for our U.S. headquarters because of simple cost-benefit economics. The labor force here is excellent – well-educated, friendly, hard-working, honest, analytical, creative. The talent pool is plentiful across our many functional business areas, including customer service, claims handling, IT, accounting, marketing, sales, compliance, and insurance operations, as well as call center operations.

KEVIN CHIDWICK
CEO, ELEPHANT AUTO INSURANCE (JUNE 2015)

”



AVEPOINT



OUR TALENT PRODUCTION

Virginia is known for its world-class post-secondary education system that provides a robust pipeline of new graduates from local and regional universities. Building on our existing education assets, Greater Richmond will provide Amazon a stable talent pipeline to support the company's growth projections. For a full list of universities and community colleges with relevant degrees and the number of students graduating with those degrees over the last three years, please see the Appendix available in the document download on RVA.AMZNHQ2.COM.

*Virginia's 72 four-year
colleges and universities educate*

~500,000

students each year





No.1

public university system in the
country, according to Smartasset

— *& is home to* —

*3 of the
country's top 25*

public universities ranked by
U.S. News & World Report: University of Virginia,
College of William and Mary, and Virginia Tech.

It is ranked the
*6th-best state
in education*

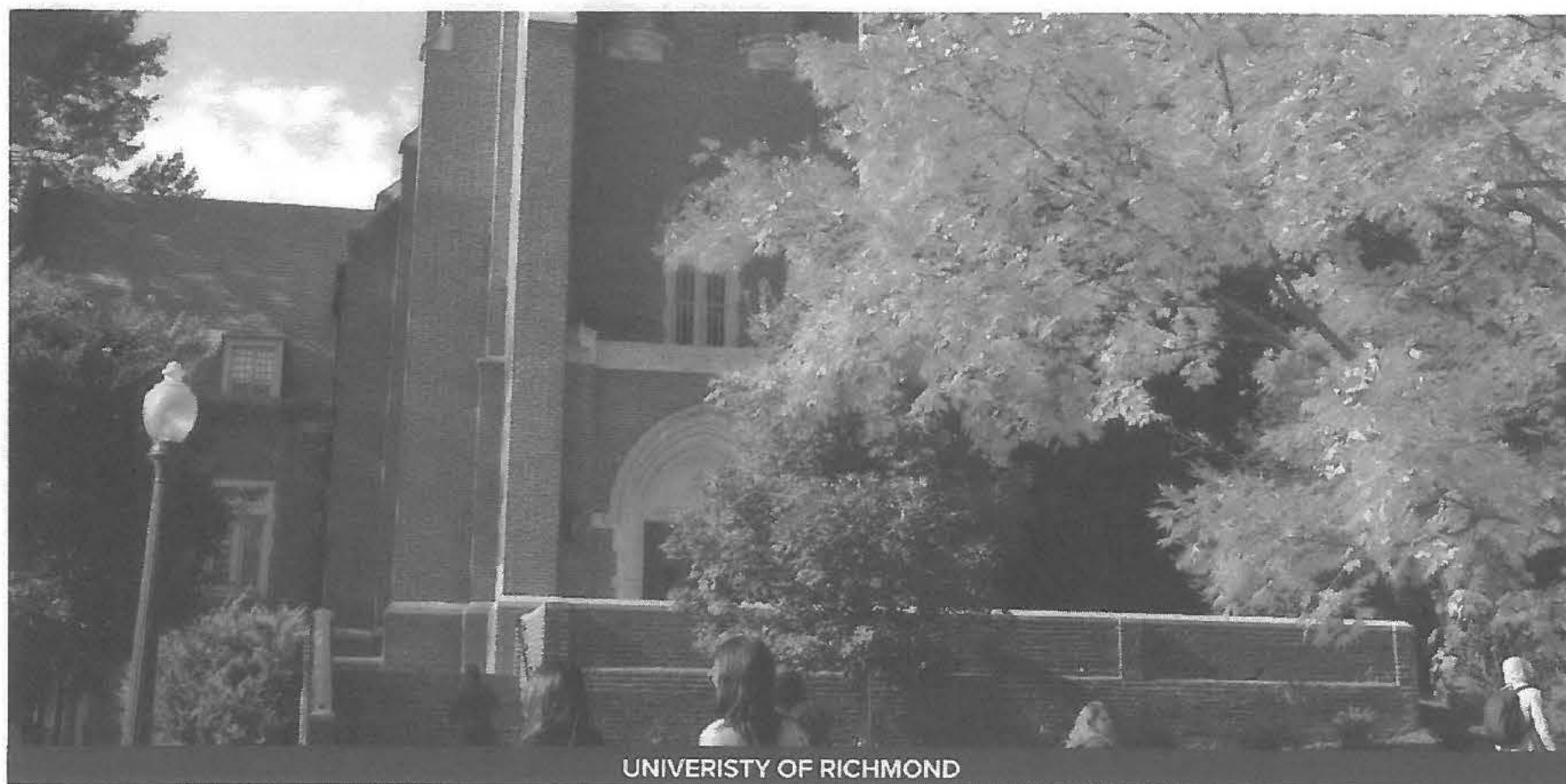
by WalletHub

— *&* —



10th best

by U.S. News & World Report

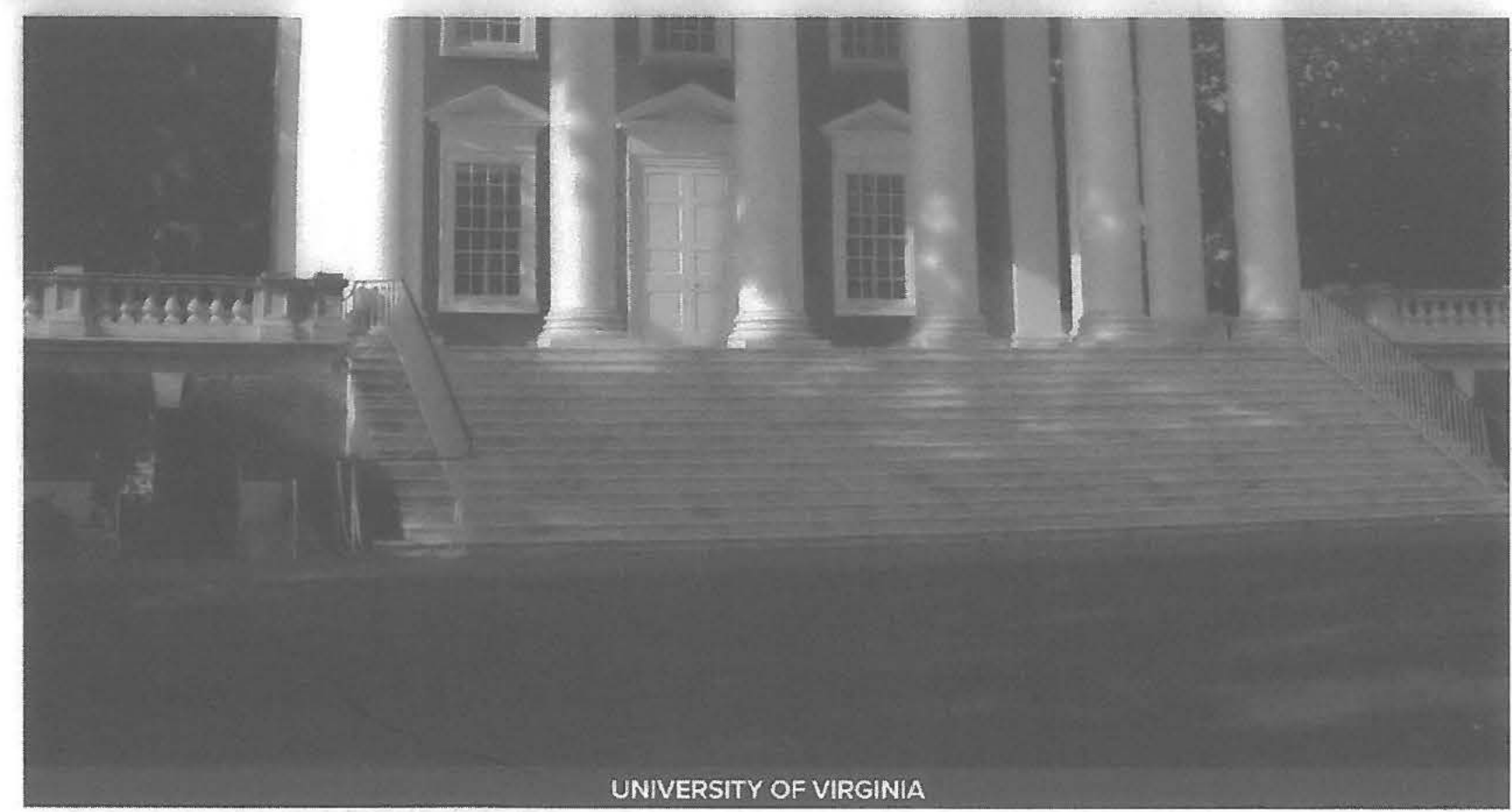


UNIVERISTY OF RICHMOND



“UVA’s relentless pursuit of a better future begins with the ingenuity and energy of its students. They challenge conventions, learn and lead with passion, and leave here ready to propel innovators such as Amazon to new heights. Our University community is committed to meeting Amazon’s workforce and research needs in Virginia.”

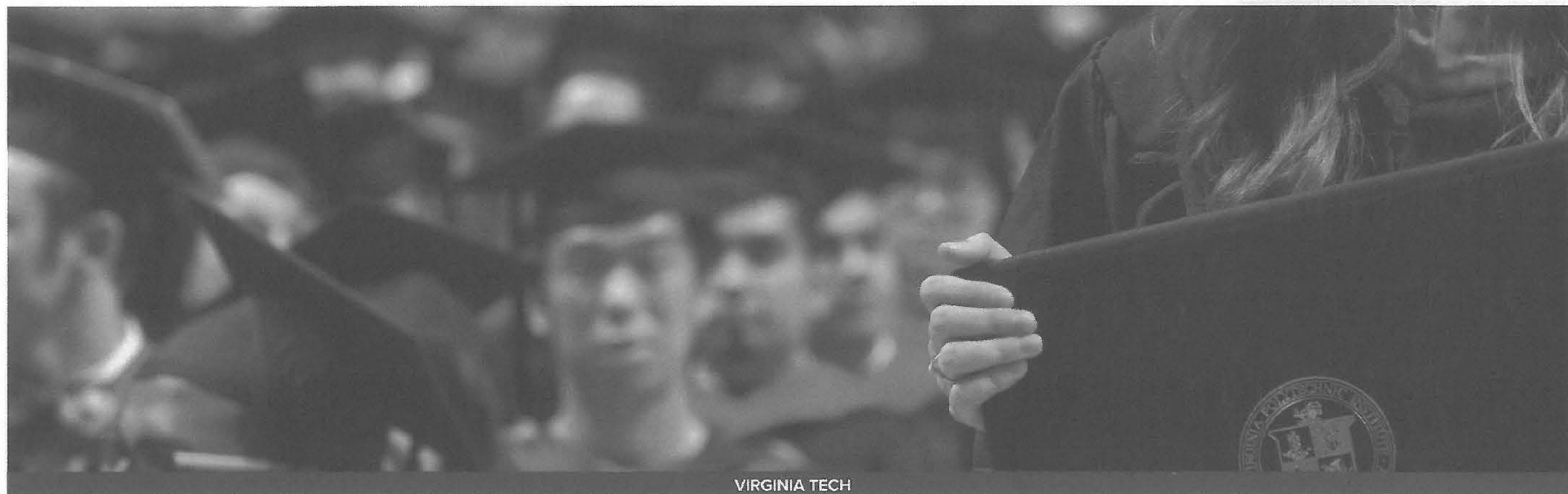
TERESA SULLIVAN
PRESIDENT, UNIVERSITY OF VIRGINIA



UNIVERSITY OF VIRGINIA

“Virginia Tech can be a great partner for Amazon. With a top-15 ranked engineering and computer science program that stands 4th in the nation in undergraduate degrees awarded and a commitment to enrollment growth, we can contribute a robust talent base that aligns with Amazon’s core values and greatest needs. Top technology firms that hire our graduates tell us they hit the ground running with the expertise, work ethic, team orientation and grit necessary to succeed. Our leading research programs in cybersecurity, transportation, autonomous systems and data analytics are use-inspired and aimed at rapid integration into the commercial sector. Our statewide presence supports regional innovation ecosystems and provides our industry partners with strategic leverage and expertise. We would enthusiastically welcome the opportunity to work with one of the world’s most innovative companies here in the great Commonwealth of Virginia.”

TIMOTHY SANDS
PRESIDENT, VIRGINIA TECH



VIRGINIA TECH

“

The Richmond region is a home for creativity, innovation, and entrepreneurship like maybe no place else in America. Part of the reason why is VCU, a remarkably diverse, world-class public research university that commits to—and benefits from—its vibrant urban setting. More than half of our 32,000 students want to start a company someday, and 15 percent do before they even graduate. VCU students started 22 companies last year. Paired with the nation's no. 1-ranked public School of the Arts, we are a creative and innovative powerhouse with a \$6 billion impact on Virginia.

But the inspiring spirit of Richmond is more than VCU. The burgeoning innovation ecosystem is providing clear pathways to move ideas into the marketplace to make people's lives better. We are home to dreamers and doers, people committed to working together to tackle what's difficult. We are a city with a rich past that is embracing a limitless future.

Bringing HQ2 to a pioneering and innovative city like Richmond would give Amazon a well-educated and inspired workforce, composed of graduates from one of the world's top 200 research universities. It would further enhance the culture of and commitment to innovation across our region. It would be the next step in Richmond's emergence on the world stage.

MICHAEL RAO
PRESIDENT, VIRGINIA COMMONWEALTH UNIVERSITY

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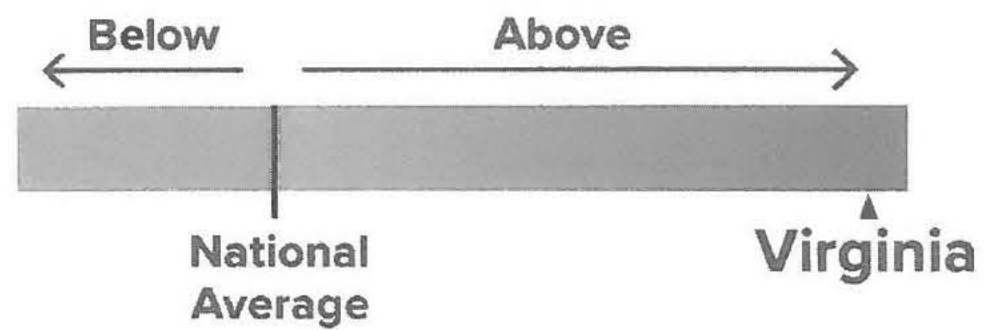


WILLIAM AND MARY

William & Mary, the second-oldest institution of higher education in America, would welcome warmly to our part of the world the second headquarters of Amazon. Virginia would be an outstanding location. When the creative resources of the Commonwealth's universities are linked with cutting-edge industry, opportunities increase exponentially for all. I hope we will be able to explore in more detail the many ways William & Mary could work together with Amazon here in Virginia.

W. TAYLOR REVELEY, III
PRESIDENT, COLLEGE OF WILLIAM & MARY

Concentration of Tech Workers



Source: Bureau of Labor Statistics, Occupational Employment Statistics, 2016

Virginia's colleges and universities produce a massive number of graduates in areas most relevant to Amazon – over 3,500 bachelor's level or higher tech graduates every year, 15,000 management graduates, 1,600 legal graduates, and 2,000 accounting graduates.

Greater Richmond's portion of that talent pipeline is significant: 371 CS graduates per year, 237 annual accounting and auditing graduates per year, 165 legal graduates per year, and 1,798 business graduates per year ensure that a significant component of Amazon's talent would come from right next door.



VCU CAMPUS

Computer science graduation
rates are increasing more than

2 *times*
faster

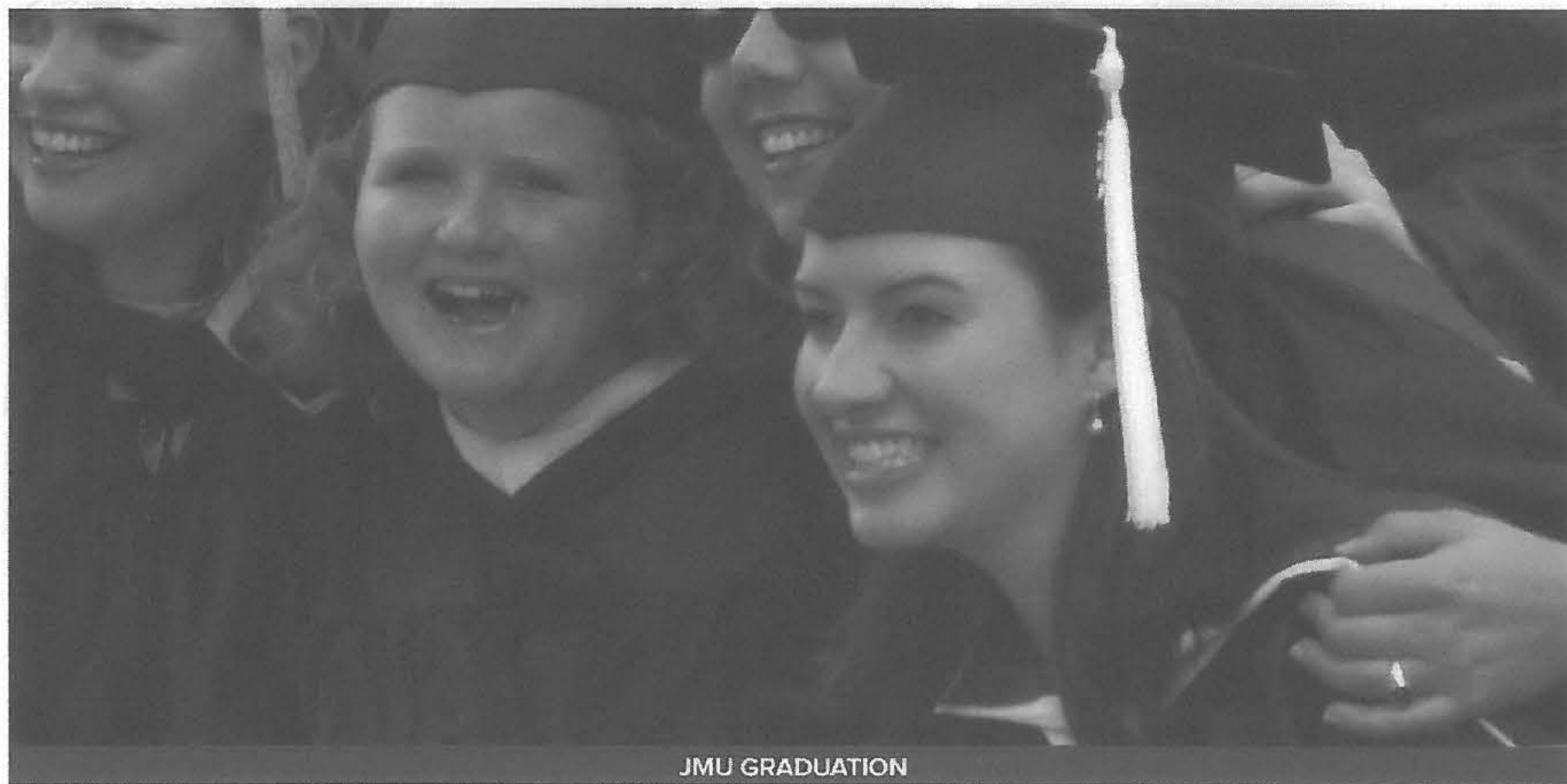
in Virginia than the U.S. average



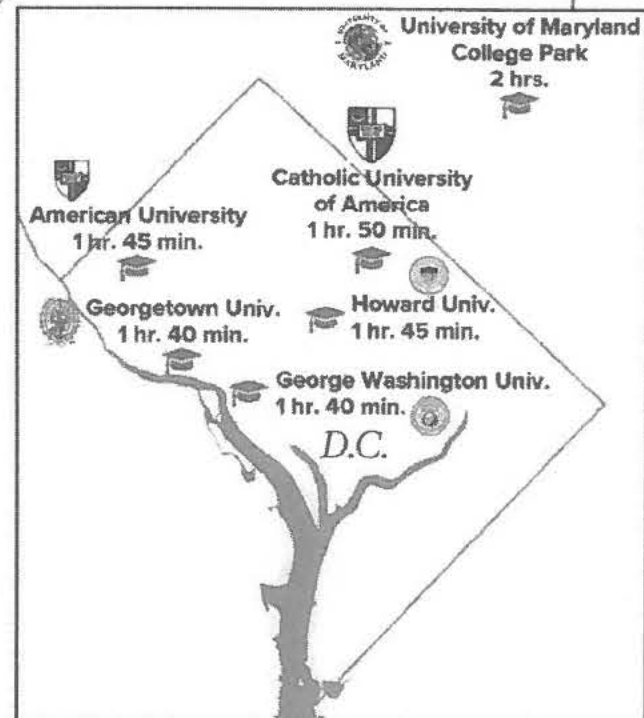
Much of our talent stays local:

60%

of Virginia's talent stays in
the state after graduation,
compared to the national
average of 54%



JMU GRADUATION



MARYLAND

Morgan State Univ.
2 hrs. 30 min.

Johns Hopkins Univ.
2 hrs. 30 min.

George Mason University
1 hr. 35 min.

James Madison University
1 hr. 55 min.

University of Virginia
1 hr. 10 min.

VIRGINIA

Virginia Tech
3 hrs. 20 min.

University of Richmond
15 min.

RICHMOND

VCU Virginia Commonwealth University
15 min.

College of William and Mary
1 hr.

Old Dominion University
1 hr. 40 min.

NORTH CAROLINA

Wake Forest University
3 hrs. 50 min.

North Carolina A&T State University
3 hrs. 15 min.

Duke University
2 hrs. 35 min.

University of North Carolina at Chapel Hill
2 hrs. 50 min.

East Carolina University
2 hrs. 50 min.

A MAGNET FOR TALENT

Our strategic location and compelling quality of life have helped us become a magnet for talent, both in our state and beyond. Between 2010 and 2016, Greater Richmond has benefited from high net-positive migration, with an inflow of 43,000 new residents from domestic and international sources.

Our education assets are one anchor attracting highly-educated talent to our region. Eighteen top schools are within a ~ three-hour drive radius of Greater Richmond, and more than 1.6M post-secondary students are located within 150 miles.



Another anchor of our talent attraction is our unparalleled access to the majority of the existing high-skill workforce in Virginia.

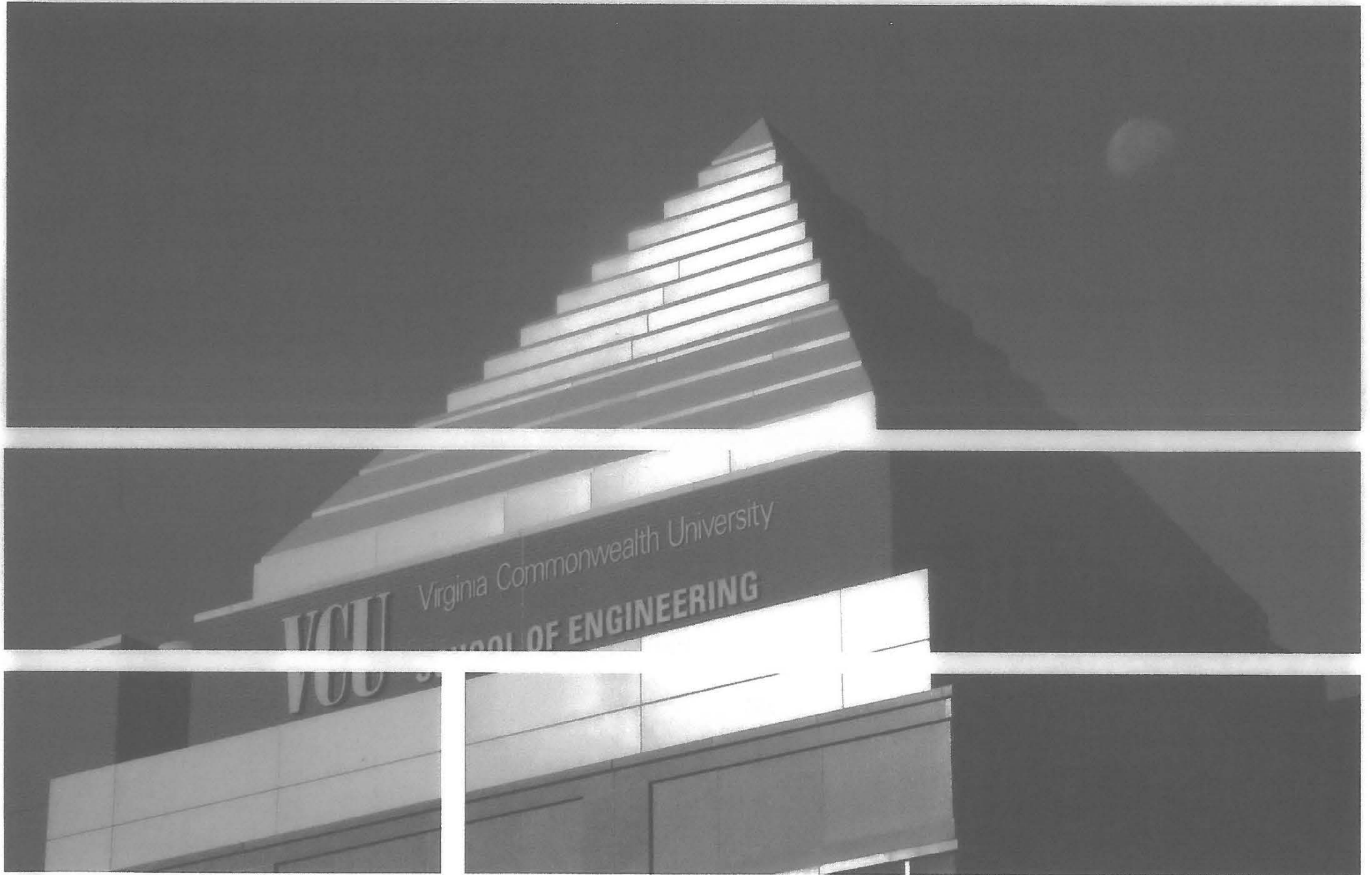
Our robust growth is not only from throughout the region, but also national and global in-migration. People come to Greater Richmond for great education and new professional opportunities, and they stay for our vibrant culture and welcoming communities.



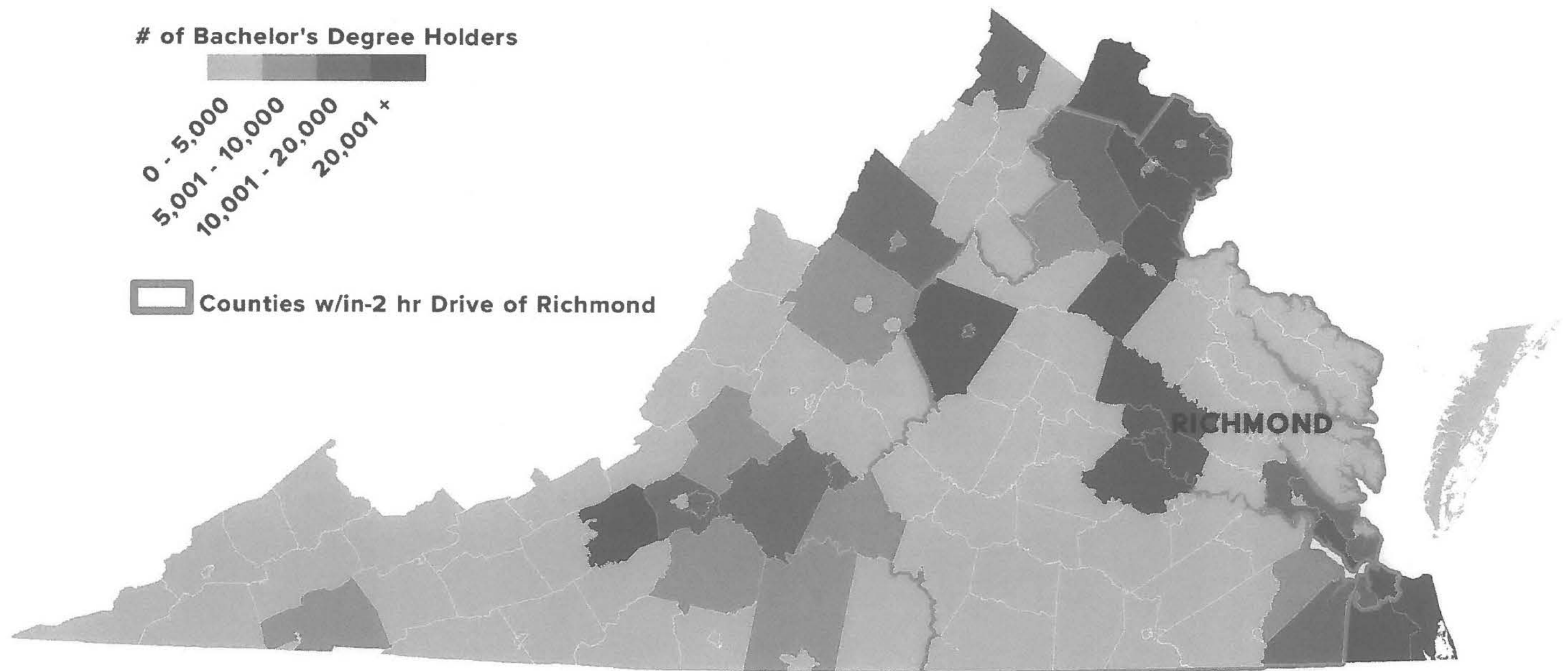
“*Richmond is a compelling place to build a career over a decade or more. It's half the cost and 1/20th the traffic congestion [of Washington, D.C.].*”

ANDREW FLORANCE
COSTAR FOUNDER AND CHIEF EXECUTIVE OFFICER

”



*72% of Virginians with a bachelor's degree
or higher live within a two-hour drive of Richmond*



Source: U.S. Census Bureau, 2016 American Community
Survey; TomTom Drivetime estimates



TALENT AT A FRACTION OF THE COST

Our tech workforce density and proximity to top-notch talent, along with our low cost of living, means that Amazon can attract the skilled workers you need at wages well below other metros. Applications and systems software developers earn median wages of \$70k and \$90k, respectively – significantly lower than competing HQ2 MSAs.

Category	Median Wage
Management Occupations	\$ 86,060
Accountants and Auditors	\$ 61,620
Software Developers, Applications	\$ 70,920
Software Developers, Systems Software	\$ 90,730
Lawyers	\$ 63,380
Office and Administrative Support Occupations	\$ 29,530

“Overall, it is substantially cheaper here... so there is a huge advantage for us to moving a lot of our operations out of a very expensive area [New York] to an area which is more cost-effective, yet has a highly skilled workforce.”

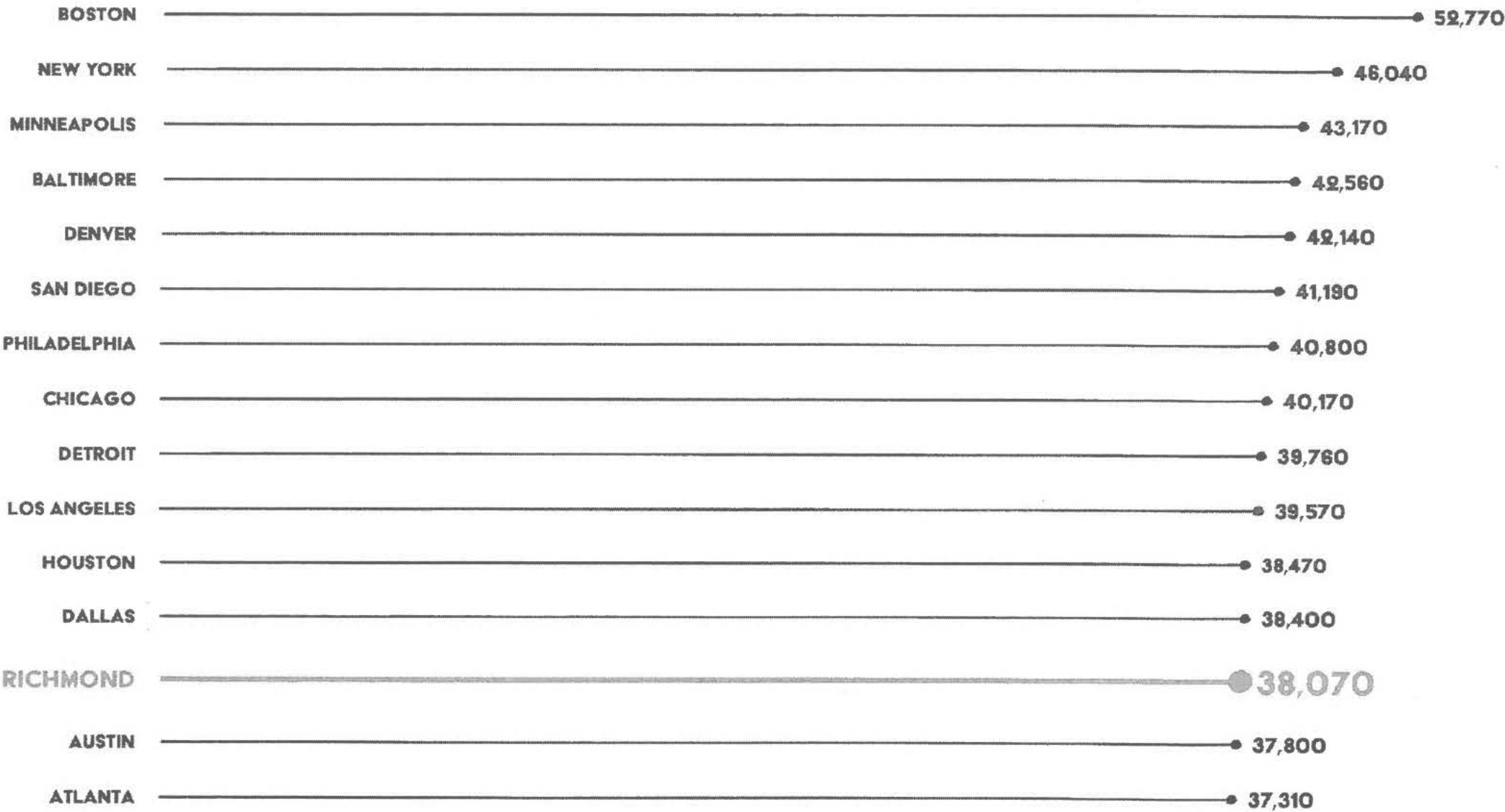
BRIAN BROWN
COO AND GENERAL COUNSEL,
AVEPOINT



LOW MEDIAN WAGES IN RICHMOND COULD DRIVE DOWN LABOR COSTS FOR AMAZON

MEDIAN WAGE

\$



SOURCE: BUREAU OF LABOR STATISTICS 2016



BUILDING THE FUTURE – K-12 STEM

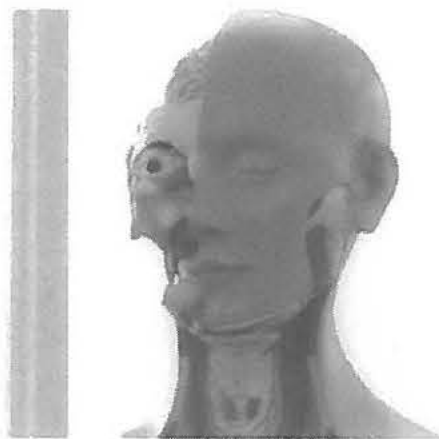
Looking forward, we are committed to building the right pipeline of talent for Amazon and for the region's economy.

We provide students high-quality education at the cutting edge of technology and science. Virginia starts from a strong base, ranking fourth nationwide in the percentage of students who have passed an AP STEM exam.

We continue to push the frontier:

Our computer science education is a feature of K-12 education, as evidenced by Governor McAuliffe signing legislation calling on the State Board of Education to include computer science, computational thinking, and computer coding into the "Standards of Learning" curriculum, which sets forth standards for student learning, achievement, and standardized testing.







Virginia has also made computer science education in K-12 a statewide curriculum priority. The Governor signed legislation requiring computer science course credits to satisfy state graduation requirements in science, math, or career and technical education. Virginia also requires all secondary schools to offer computer science. We've cleared certification pathways for computer science teachers.

We've matched the state's enthusiasm at the local level, too, partnering with our schools and business community to promote computer literacy and engineering. Greater Richmond school systems have taken the lead with innovative local initiatives to promote K-12 STEM and computer science education. Our focus on building our students' critical thinking and scientific abilities early on will set the course for a stable talent pipeline over the long-term.

- Local programs like the MathScience Innovation Center and the STEM Fair give teachers and students access to the latest scientific training
- We have sponsored experimental schools like CodeRVA, located in Greater Richmond, which focuses on computer science and internship-based learning and serves over 100 high school students
- Henrico County was the first public school system in the U.S. to implement a one-to-one computer-to-student laptop initiative
- The National Association of Counties has also recognized nine innovative programs at Henrico County schools, including a unique partnership between the Career and Technical Education Center and the company filming the award-winning movie "Loving," as well as programs in web development, digital citizenship, and refurbishing computers for the community



*Henrico County's Deep Run
High Schools robotics team
won the world title for robotics
at the 2016 FIRST
Robotics Competition
Championship in St.
Louis, which features 600 of
the best teams in the world, and
represented 24 countries.*



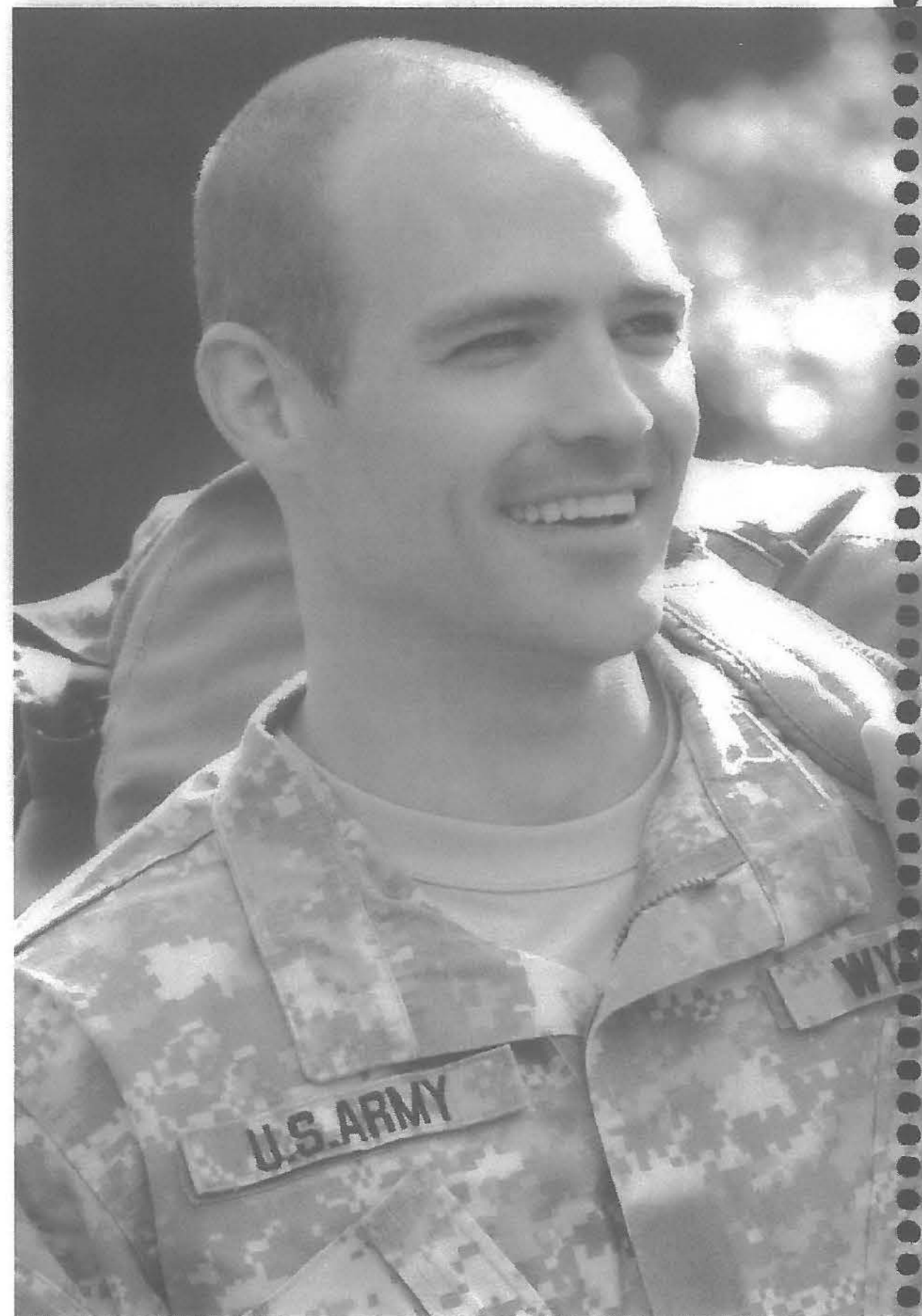
VIRGINIA'S VETERANS

Virginia is also proud to be home to 476,000 working veterans, the fourth-largest veteran workforce in the country, representing a group of men and women with unique skills relevant to Amazon. This vital workforce can help Amazon meet its Joining Forces pledge to hire 25,000 veterans and military spouses over the next five years.

They are also an integral part of the Richmond spirit. In our communities, homes, and businesses, Richmond's distinguished veterans provide key skills and leadership across the region. Many local veterans have particularly valuable expertise to offer Amazon, given Richmond's proximity to the Army Logistics University at Fort Lee.

“*Virginia boasts more veterans per capita in our labor force than in any other state in America. We each have the responsibility to serve these veterans just as they have served us, and I'm proud that we've been able to do that effectively through the Virginia Values Veterans program. This is a true public-private partnership that has a proven track record in encouraging companies to hire and retain skilled veteran leaders in our civilian workforce.*”

GOVERNOR TERRY MCAULIFFE





More than

90,000

veterans live in the
Greater Richmond region.



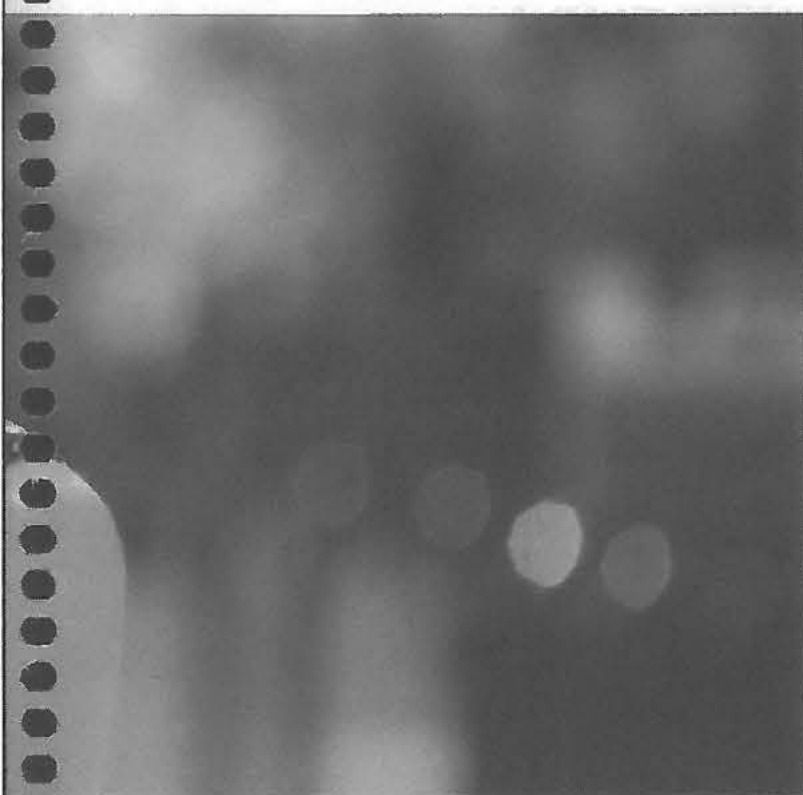
OUR HISTORY OF ACADEMIC & INDUSTRY PARTNERSHIPS

We are ready to partner with you on further strengthening our talent pool in the state and the region. We have a long history of collaborating with our local businesses and universities in research and training to help companies achieve their goals. There are a number of collaborations currently underway that demonstrate Virginia and Greater Richmond's ability to forge working partnerships between companies and our local universities.





- Large investments in research areas aligned with Amazon's core business (e.g., transportation, automation, big data, machine learning, artificial intelligence, and business intelligence)
- Virginia Tech Transportation Institute is the country's leading university research center on autonomous vehicles and has invested >\$110M in innovative transportation infrastructure
- Broad commitment to industry partnerships by launching Link, the Center for Advancing Industry Partnerships, an institute that serves as a template for industry partnerships and for other state universities
- Support for co-located research and incubator spaces to streamline paths to market and to foster start-ups and commercialization



- School of Engineering worked with Dominion Energy to create a nuclear engineering program
- Received funding from the Bill & Melinda Gates Foundation to establish the Medicines for All Institute to transform pharmaceutical manufacturing, reduce medication cost, and improve patient access to lifesaving medications for HIV/AIDS, malaria, tuberculosis, and other diseases around the world
- Da Vinci Center for Innovation allows corporate sponsorship of student projects relevant to their business. Collaboration between Schools of the Arts, Business, Engineering, and College of Humanities and Sciences advances innovation and entrepreneurship at the university



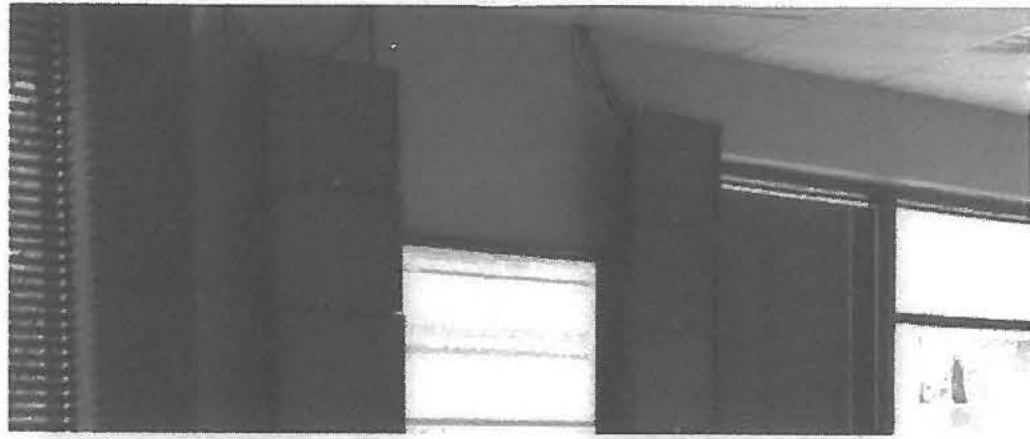
PARTNERING ON TALENT – OUR COMMITMENT TO AMAZON

The Commonwealth and region are committed to furthering our position as a leading technology economy. Under an Amazon partnership with Greater Richmond, the Commonwealth would make a commitment to the following strategic initiatives to further expand Virginia's rich talent base:

- Expand talent base by an additional 1,500 CS/engineering graduates per year: Work with Virginia's leading universities, including Virginia Tech, University of Virginia (UVA), Virginia Commonwealth University, and others, to increase production of technical degree graduates by 1,500 per year through the funding of increased faculty positions, expanded facilities, and student scholarships
- Enhance frontier research aligned with Amazon's future: Fund research programs at Virginia's top universities to create a more prepared talent base and advance frontier research aligned with Amazon's research agendas (e.g., funding autonomous vehicle research)

- Launch IT campus to spur additional talent growth: Collaborate with universities to build a dedicated IT campus in Richmond to increase production of technical degree graduates, modeled after Roosevelt Island Cornell/Technion project in New York City
- Attract and retain talent: Fund a loan repayment program to attract and retain ~20,000 high-demand technical graduates over 10 years
- Extend tech pipeline: Develop in-school and out-of-school K-12 STEM education programming to extend the tech talent pipeline

We expect that this cluster of initiatives will substantially expand Greater Richmond's talent base, while ensuring that the graduates coming out of Virginia schools will be trained in a deeply practical way to meet Amazon's specific and evolving human capital needs. The Commonwealth would partner closely with Amazon's human resource and research professionals to ensure that newly launched programs and scholarships are aligned with the company's core objectives.



TALENT



LIVABILITY

Greater Richmond's legacy and strengths as a family community are further invigorated by the explosive growth in our young working population and relevant amenities, making Richmond a home for everyone. As a vibrant, diverse, and culturally-rich region, Greater Richmond has grown by attracting millennials and young, productive talent, thanks to its high quality of life and low cost. Nearly 1.3M people already call the MSA home, and that number is expected to grow to ~1.5M by 2040. We are the second-fastest growing millennial population, with 14.9% growth (2010-2015). That growth has helped give Richmond the sixth-densest millennial population in the country.





AFFORDABLE LIVING IN RICHMOND

Amazonians working and living in Greater Richmond would benefit from all of the community's amenities at an affordable cost. Richmond has an extremely low cost of living – far lower than other MSAs, and 35% lower than Seattle.

The monthly cost of child care for a family with two children in the Richmond region is \$1,076, nearly half as much as New York (\$2,011 per month), and 30% less than Boston (\$1,339 per month), or Chicago (\$1,294 per month).

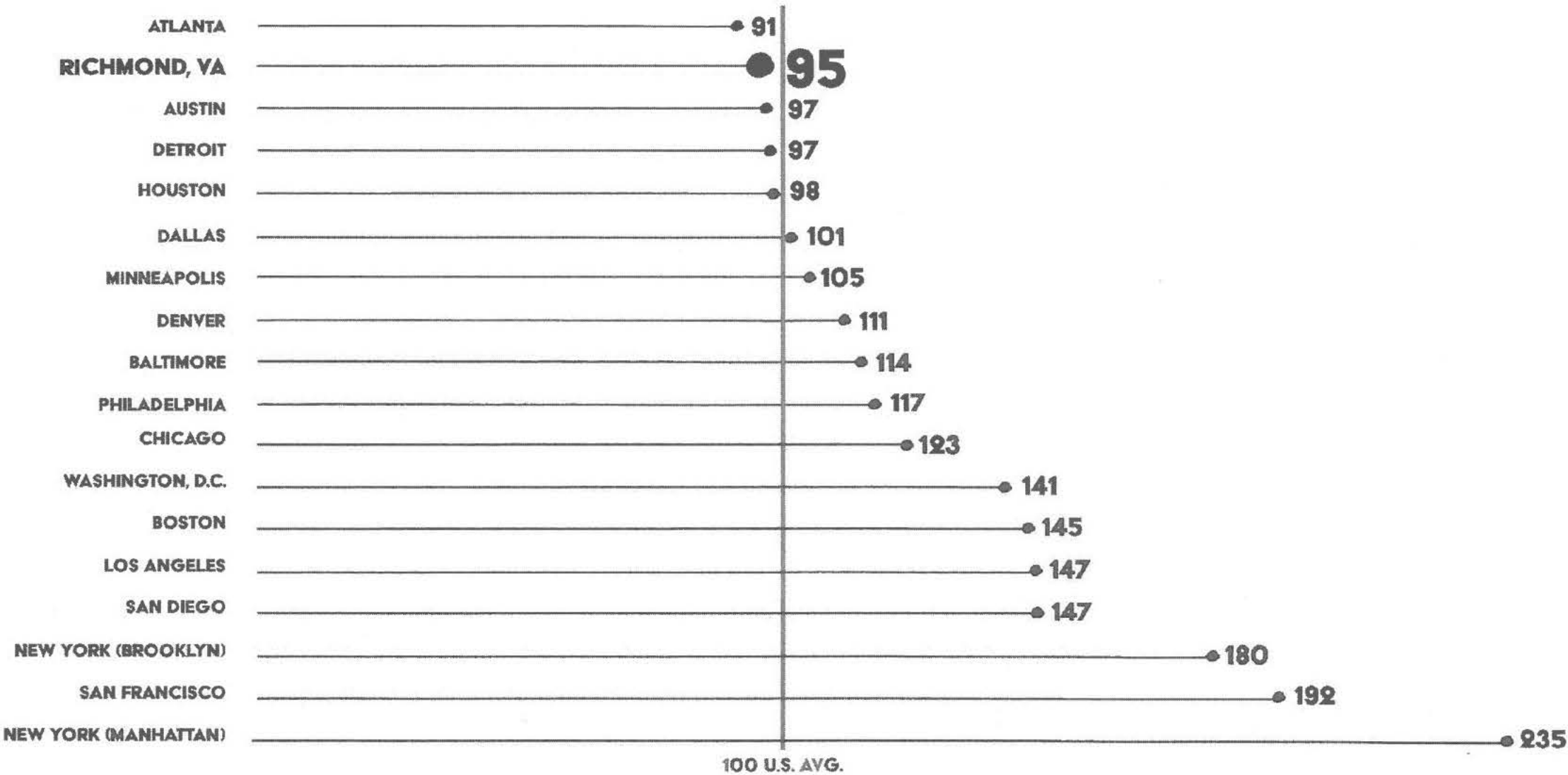
This low cost of living means that people in Richmond live well, enjoying the diversity of housing options, great restaurants, tremendous recreation, and everything else Richmond has to offer – all without breaking the bank.



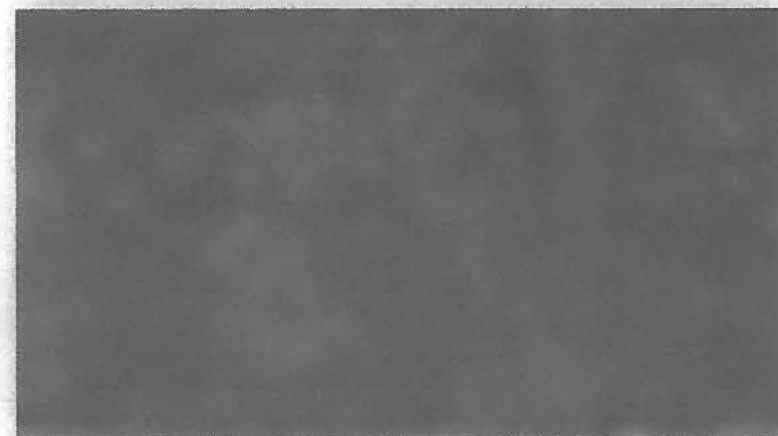
RICHMOND HAS AMONG THE LOWEST COSTS OF LIVING OF TOP HQ2 COMPETITORS

COST OF LIVING BY MSA

COST OF LIVING INDEX SCORE



SOURCE: COST OF LIVING INDEX 2017



BROMO SELTZER
FOR HEADACHE

A.W. BROADDUS
DRUGGIST



“We estimated that when we would be transferring people down here that we might not get a ton of people, because Richmond is very different from New York...That’s proved absolutely not to be the case.”

BRIAN BROWN,
COO AND GENERAL COUNSEL, AYEPOINT (2017)



A PLACE TO CALL HOME

In addition to our region's low cost of living, our housing options make the region a great place to grow roots, with a stock that is available, diverse, spacious, and reasonably priced.

Affordability

Home prices in Richmond are low, with an average price of \$286,034 compared to Seattle's \$598,150. Renters can also live affordably in the region, which offers among the lowest median rents of large MSAs at \$988 per month.

Space

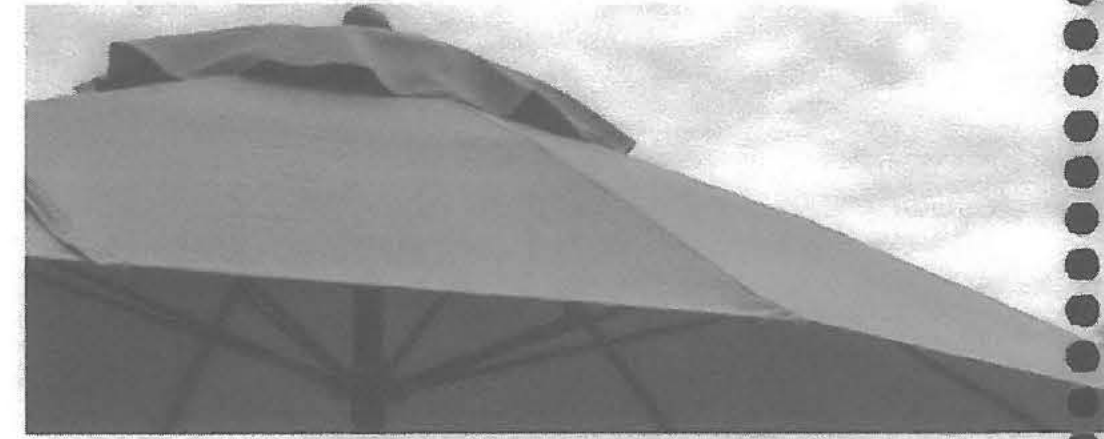
In addition to low prices, renters and homeowners in Greater Richmond are getting a lot of space for their rent/mortgage, with 90% of houses and apartments having patios, and 73% having two or more bathrooms.

Availability

Housing options are open as we continue to grow - 5% of houses are unoccupied within 40 minutes of Greater Richmond's potential HQ2 sites.

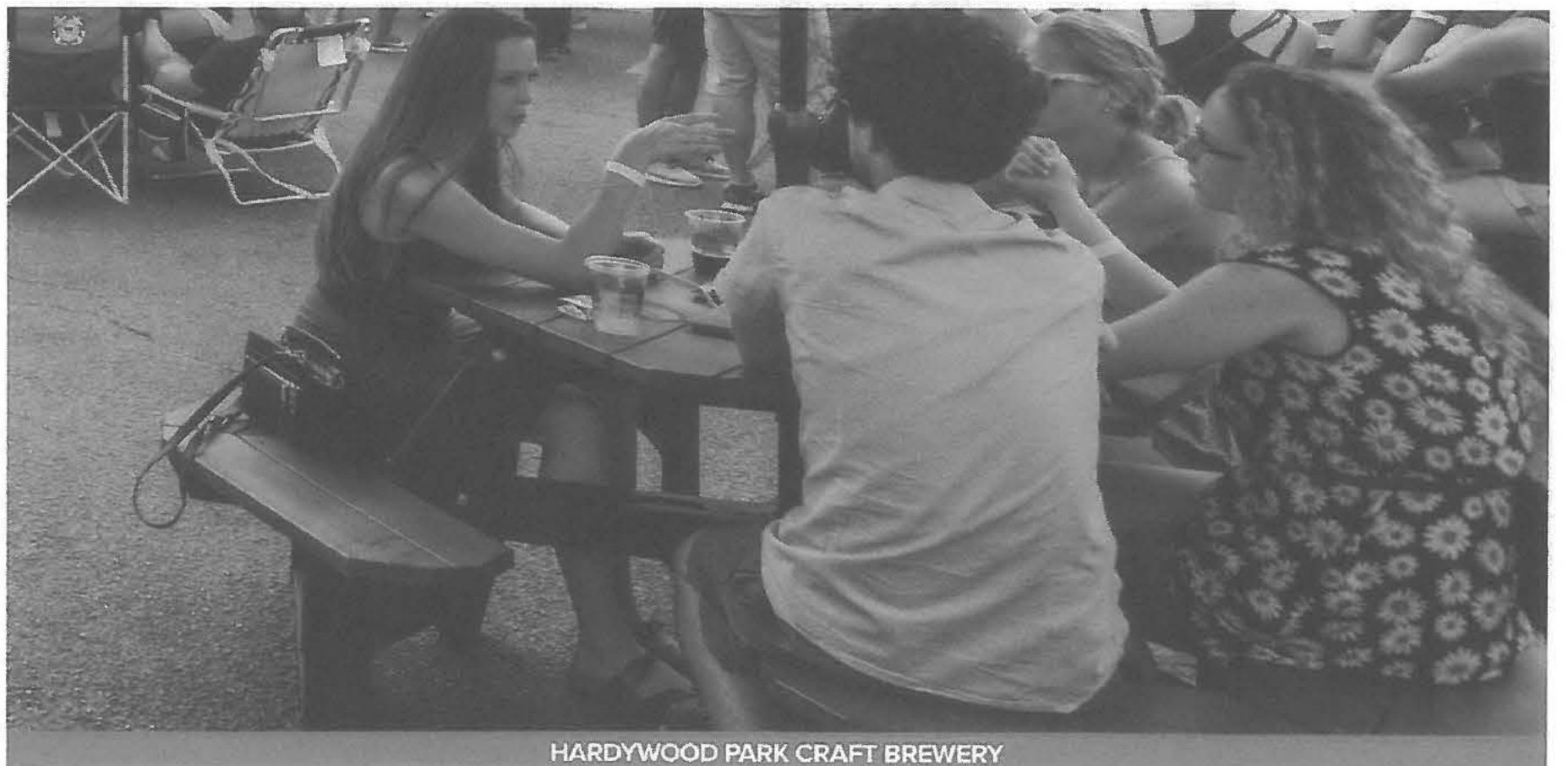
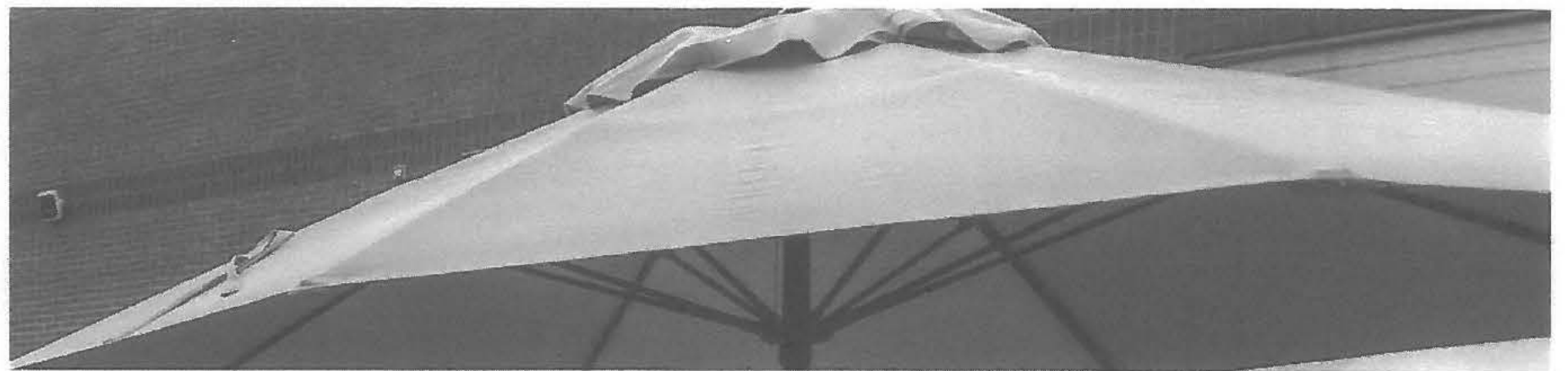
Diversity

From the bustling maker community in Scott's Addition and urban condos on the riverfront, to easily accessible row homes and large suburban houses, all with access to high-quality schools, our region has the diversity of housing options to appeal to all types of Amazonians.



*“Another thing I love about Richmond,
all of these little neighborhoods,
but they all offer a little something
different depending on your lifestyle.”*

EMILY MESSER
RICHMOND RESIDENT



HARDYWOOD PARK CRAFT BREWERY

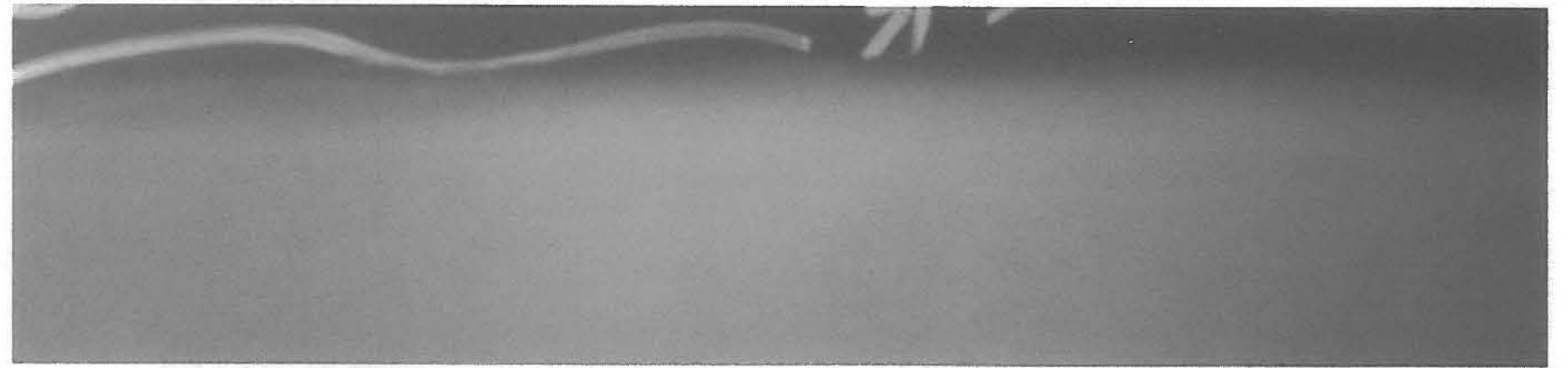


*Region was ranked in the top 10
“Under the Gaydar” LGBTQ Cities –
Trivago (June 2017)*

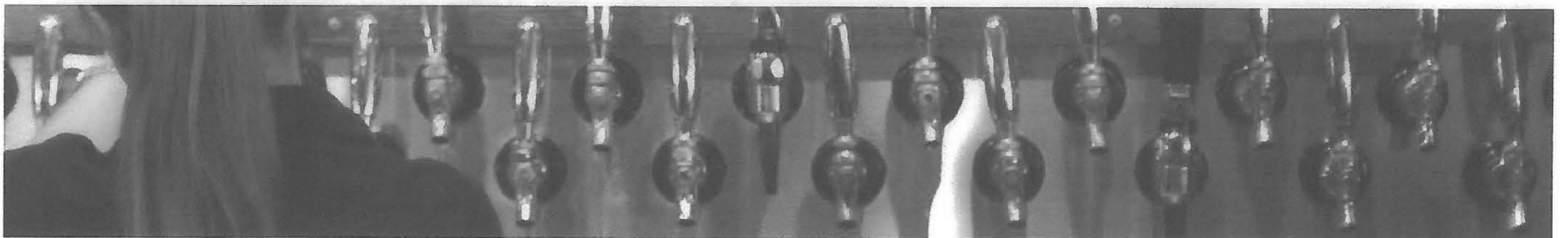
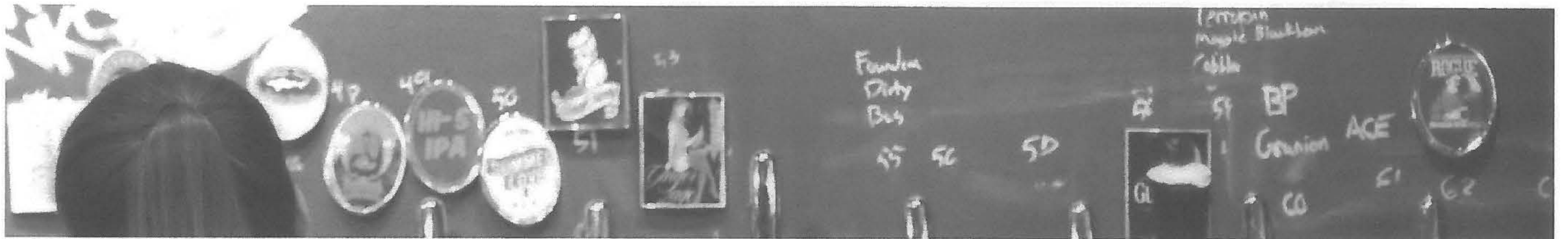
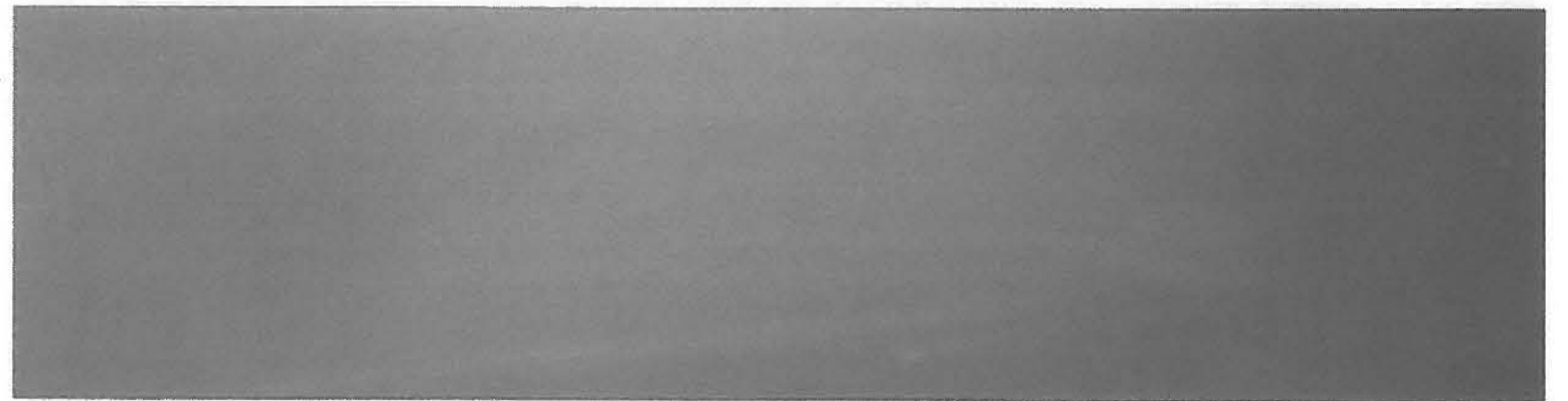


*The region’s historically black neighborhoods possess a rich and esteemed
cultural history. Jackson Ward, once known as the Harlem of the South,
houses the Black History and Cultural Center of Virginia and possesses a
National Historic District designation by the National Park Service*





*Groups such as the Richmond Triangle Players,
a theater dedicated to the city's LGBTQ
population, form the backbone of a vibrant
LGBTQ community*





“*Richmond provides a highly-educated labor pool, a superior quality of life for our employees, and a culture that aligns to our business model.*”

ANDREW FLORANCE
CEO, COSTAR GROUP

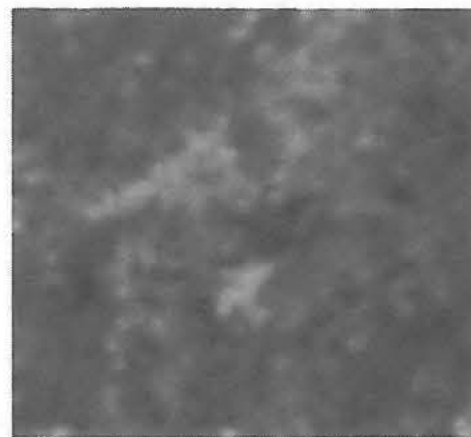
”



CHURCH HILL NEIGHBORHOOD

“I think one of the things people are pleasantly finding, especially people who have families, is how cheap it is to find a really nice place to live and how easy the commute is.”

BRIAN BROWN
COO AND GENERAL COUNSEL, AVEPOINT





MAINTAIN OUR HOUSING STRENGTHS

Leaders have recognized that as we continue to attract new residents, the affordability may decrease. Therefore, along with several nonprofits, we are making a concerted effort to create more affordable housing throughout the region and reduce the concentration of poverty. New construction is bringing state-of-the-art apartment complexes to the heart of Richmond's growing neighborhoods, providing new options alongside historical homes.

Our local governments have been committed to promoting significant growth in the housing stock over the past decade. In fact, we launched the Maggie Walker Community Land Trust in 2016 to develop land for permanent affordable housing.

The City also has an affordable housing density bonus in the zoning code and a tax abatement for developers who create affordable housing units within certain sectors of the city.

In order to meet goals to deconcentrate poverty, Richmond's housing authority is actively working to redevelop one of its housing projects into a mixed-income, mixed-use development in Richmond's East End, and has plans to continue to redevelop all of its public housing into mixed-income housing.


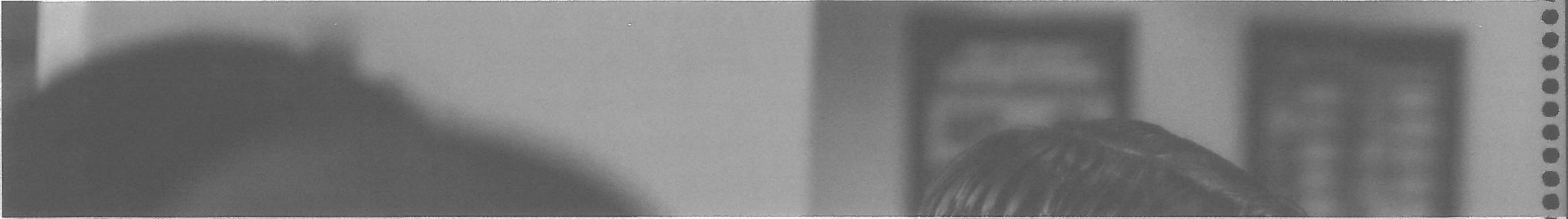
“For these folks coming, especially from the Washington, D.C. area, a lot of them have been renters for years,” O’Brien said. “They were just so excited that they could come here and actually buy, or get double their space in a rental of what they’re paying for up in the D.C. area.”

ALLISON O'BRIEN
VP, LONG AND FOSTER MOBILITY


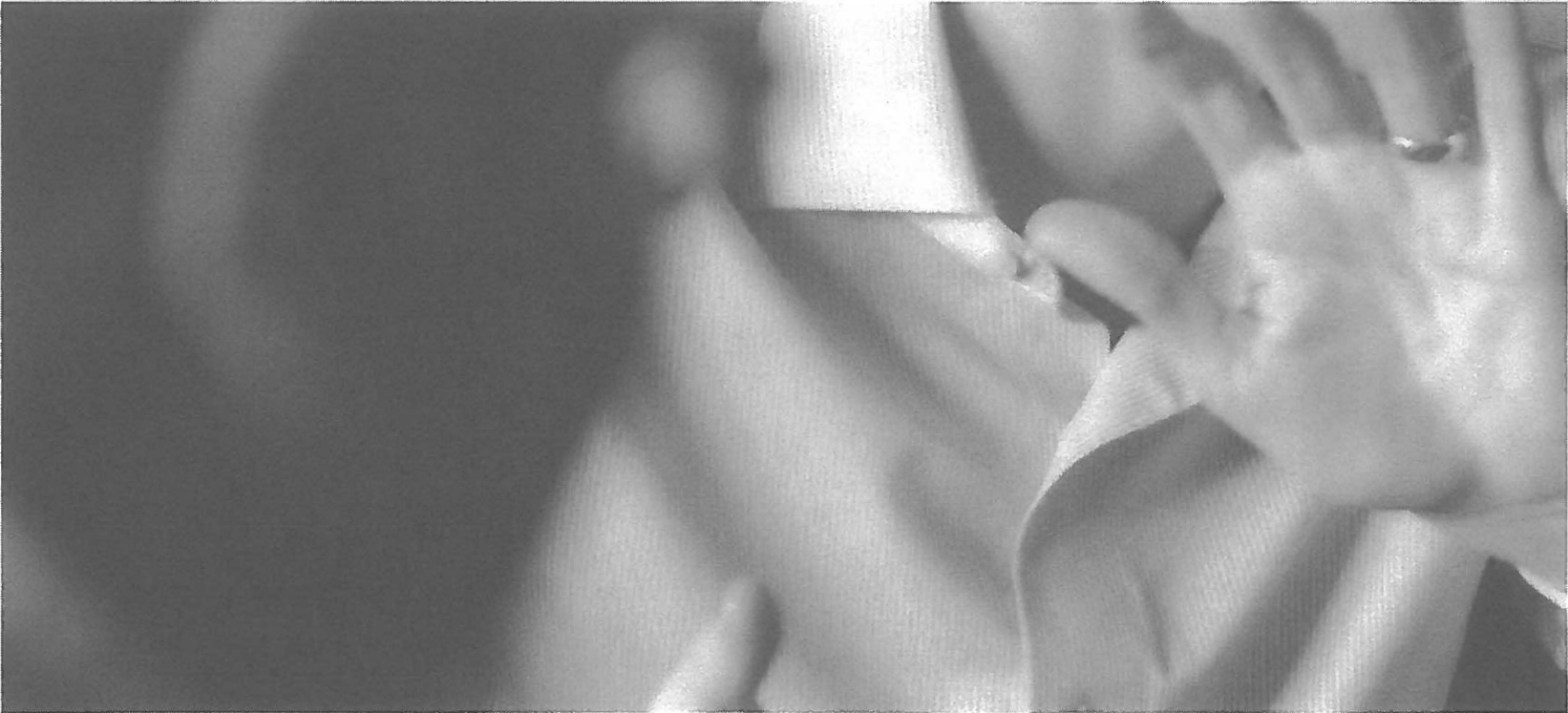


“There’s a lot of affordable housing in the Richmond metro area. We hire a lot of kids out of college, and it makes it easier for them to transition into the area. And it’s nice that they can live relatively close to work.”

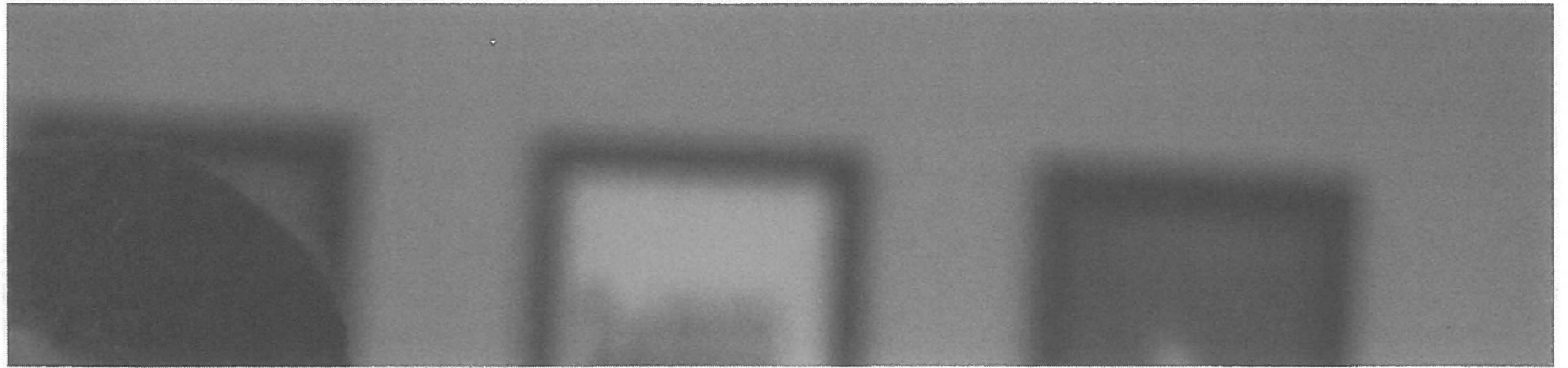
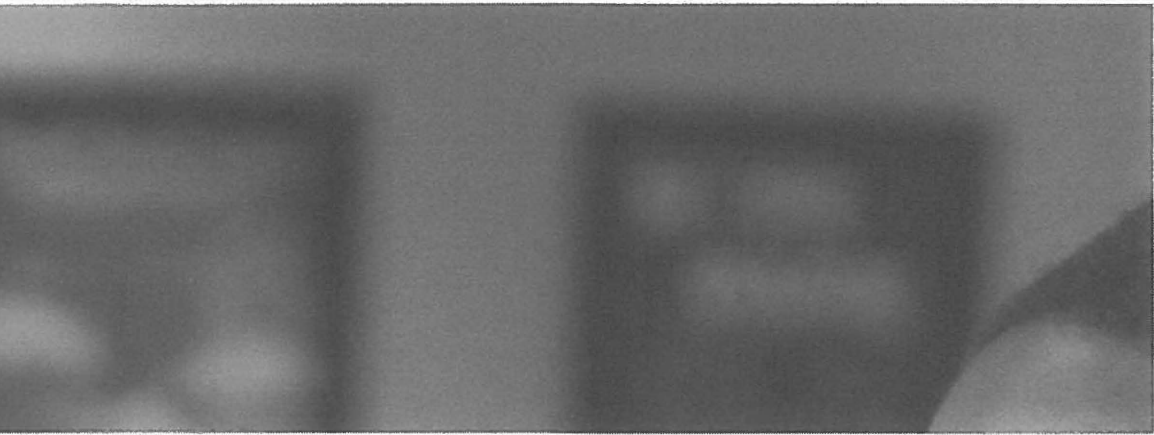
JAMES MCCARTHY
PRESIDENT, ANALYTICS CORPORATION



*Non-public schools also prioritize
diversity, with Greater Richmond
housing the Third-Most Diverse Private
High School in America*



*Two historical black colleges
in and around the region help
generate a strong community
of black entrepreneurs
and civic leaders*

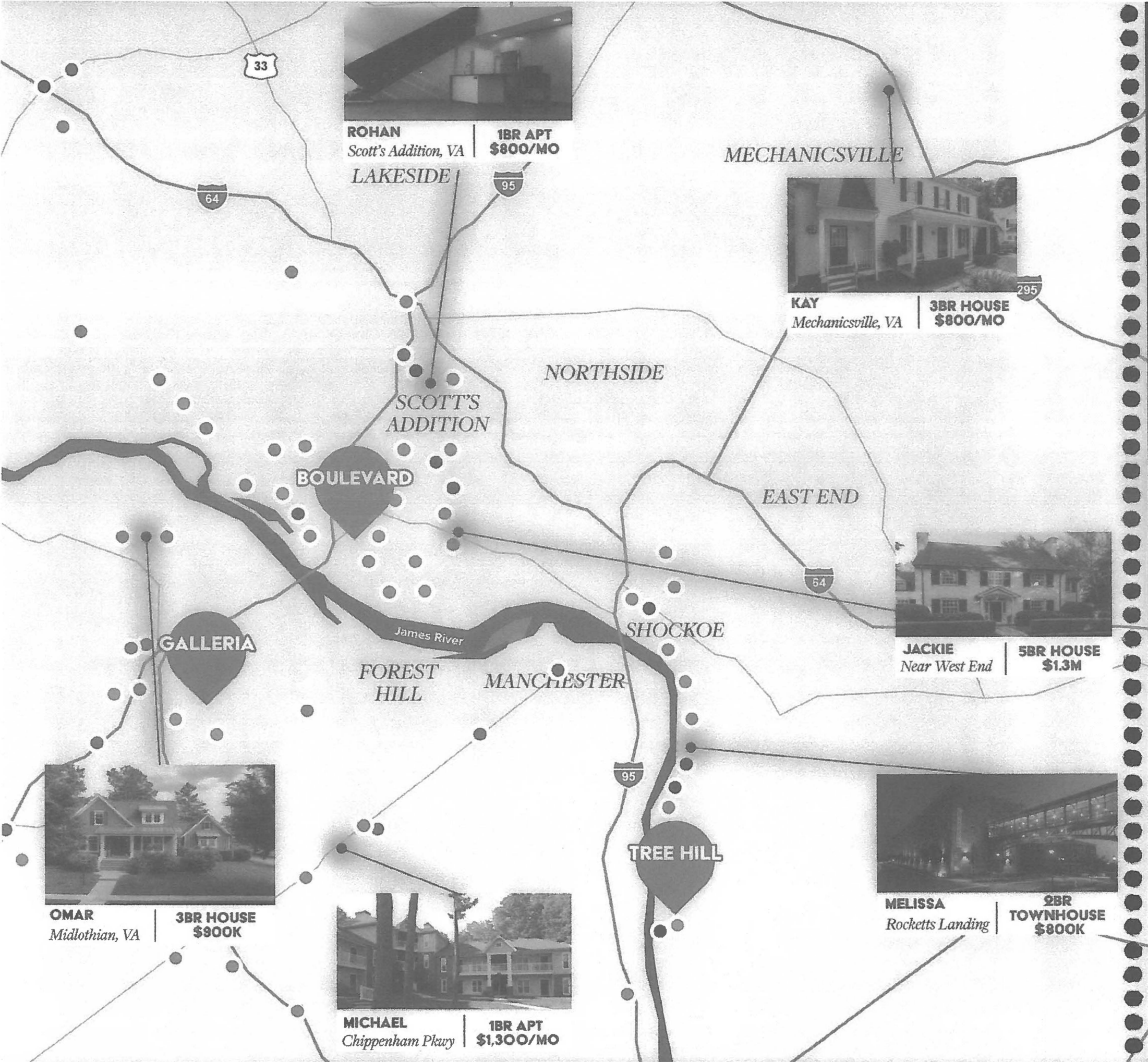


Richmond is the No.9 city for black entrepreneurs to start a business



Housing options in Greater Richmond have the unique advantages of being low cost, diverse enough to match your employee preferences, and geographically close to our three sites.

These hypothetical profiles are intended to reflect the diversity of Amazon's workforce. From a race/ethnicity perspective, they were randomly assigned to illustrate the variety of housing options that HQ2 employees might consider.





Rohan

Software Development Engineer I

Age: 23
Family: Single
Pets: Cat and dog
Salary: \$106k
Interests:
Whiskey bars
Online dating

Rohan chose to live in the Scott's Addition neighborhood of Richmond. He looked for a hip neighborhood with energy, restaurants, and good commute times to work. **He also considered: Shockoe Bottom and The Fan.**



Kay

Executive Assistant

Age: 31
Family: Single,
1 child
Salary: \$65k
Interests:
US Navy veteran
Local music

Kay chose to live in Mechanicsville, VA. She was searching for the best value possible with top schools. **She also considered: Bon Air and Henrico Redevelopment area.**



Jackie

Corporate Counsel

Age: 37
Family: Married,
Robert, 2 children
Salary: \$175k
Interests:
Peloton cycling
Nonprofit Board

Jackie chose to live in the Near West End of Richmond. She was looking for a home with a top school district and a community of cultural leaders. **She also considered: Windsor Farms and River Road Corridor.**



Melissa

Software Development Engineer II

Age: 29
Family: Married, Pete
Salary: \$122k
Interests:
Video games
Hiking

Melissa chose to live in the Rocketts Landing neighborhood of Richmond. She was looking for an upscale, comfortable, and connected home. **She also considered: The Fan and Church Hill.**



Omar

Senior Technical Project Manager

Age: 44
Family: Married,
partner Jeff, 3 kids
Salary: \$161k
Interests:
Culinary arts
VA wineries

Omar chose to live in the town of Midlothian, VA. He was looking for a home with great schools, some space for the kids, and a comfortable feel. **He also considered: Short Pump and the Near West End.**



Michael

Financial Analyst

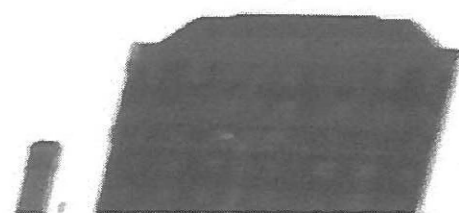
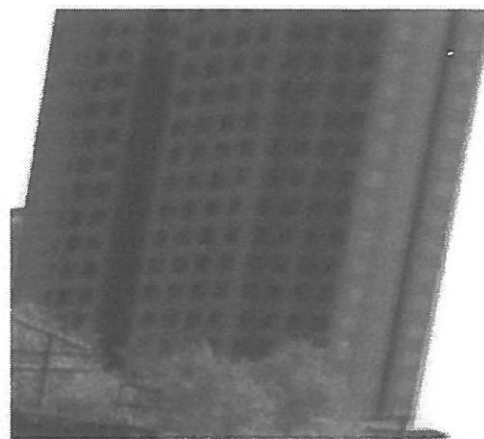
Age: 28
Family: Girlfriend,
Annie
Pets: Dog
Salary: \$80k
Interests:
Craft beer
Georgia football

Michael chose to live on Chippenham Parkway in Richmond. He was looking for a home that helped him escape and relax without blowing the budget. **He also considered: Manchester and Short Pump.**

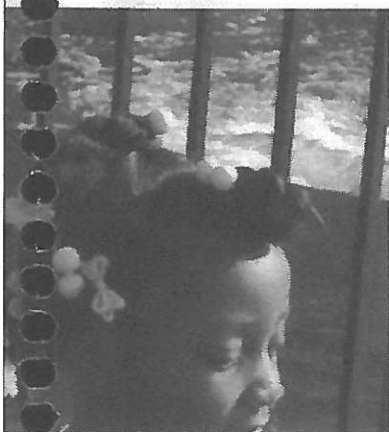


*Richmond is a highly diverse
and integrated city: 38% nonwhite*

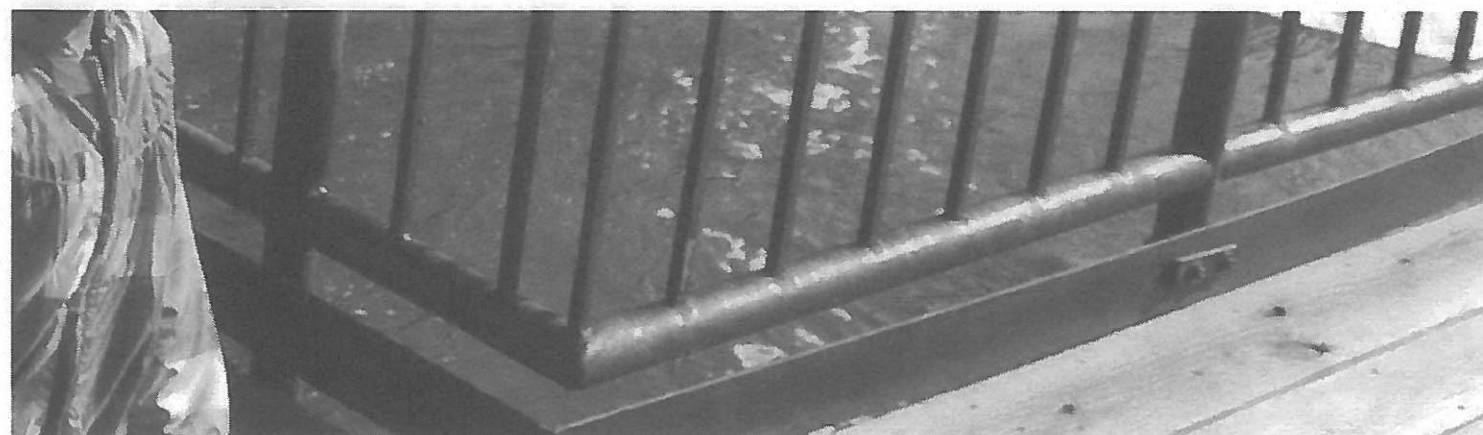




Richmond's percentage of nonwhite students is 8% higher than the rest of Virginia and 6% higher than the U.S. average



Greater Richmond residents speak more than 38 languages





A COMMUNITY FOR EVERYONE

In Greater Richmond, excellent health care and exceptional education are readily available. We offer Amazonians an attractive quality of life in a historically rich, creative, engaging community.

High-quality care is readily available with 4,100 physicians, 19 acute care and specialty hospitals, and over 4,000 staffed beds nearby. VCU Medical Center, the third-rated hospital in Virginia, is in the heart of the city and able to provide employees with cutting-edge care locally, and is nationally-ranked in multiple adult/pediatric specialties (U.S. News).

Our education system continues to be a national leader, ranking No.8 in the country for college readiness, and Greater Richmond is home to 29 schools ranked 9/10 or above. Nine schools in Henrico, Chesterfield, and the City of Richmond are recognized nationally by U.S. News & World Report.

Our region, like our state, is made stronger by our diversity, and by being a welcoming home for all.

“*[Richmond] has harnessed its creativity and diversity to create this wonderful group of people who support it so much.*”

MOLLY CONABOY
RICHMOND RESIDENT



“*Diversity and inclusion are truly values at VCU, and they must permeate every part of our university, from curriculum to hiring, to health care, to the business decisions we make. Inclusion should matter everywhere. Not just among our students, not just among our faculty, but every place that is a part of VCU. Diversity will not be a tagline or a boilerplate here. It will be an honest commitment that we have the courage to make and to defend.*”

MICHAEL RAO
PRESIDENT, VIRGINIA COMMONWEALTH UNIVERSITY

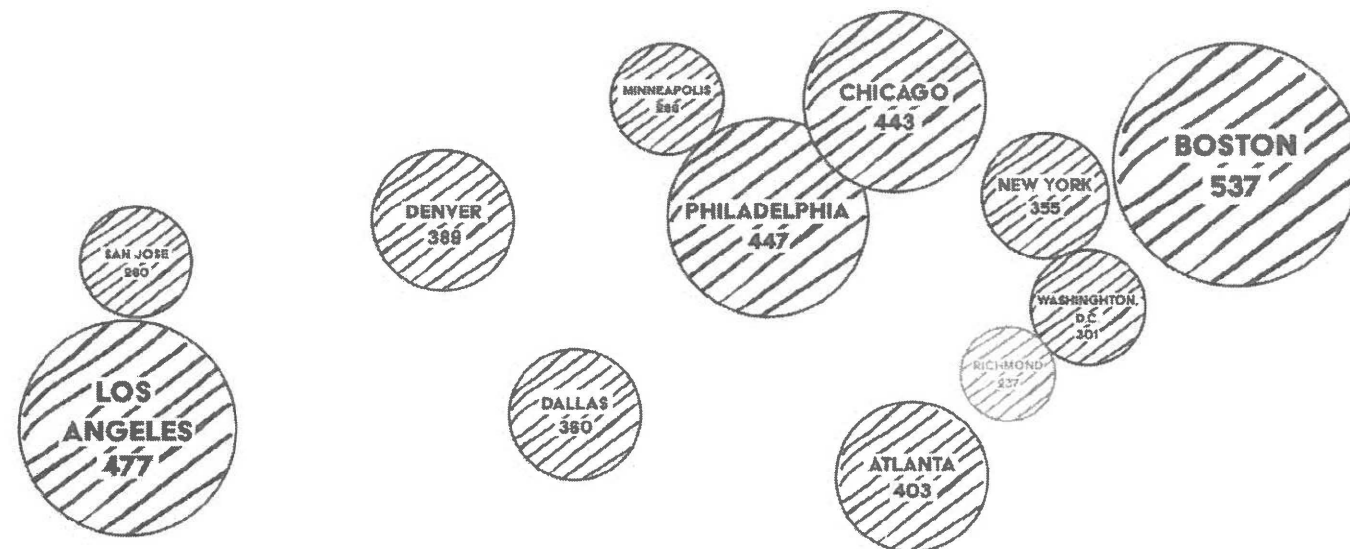


SAFETY FIRST

Amazonians will find in Virginia and Greater Richmond a safe place to live with their families. Crime in the state of Virginia is very low. Virginia ranks No.3 nationally in lowest rates of violent crime and No.10 nationally in lowest rates of property crime. The Richmond MSA has a particularly low violent crime rate: ~38% below the national average.

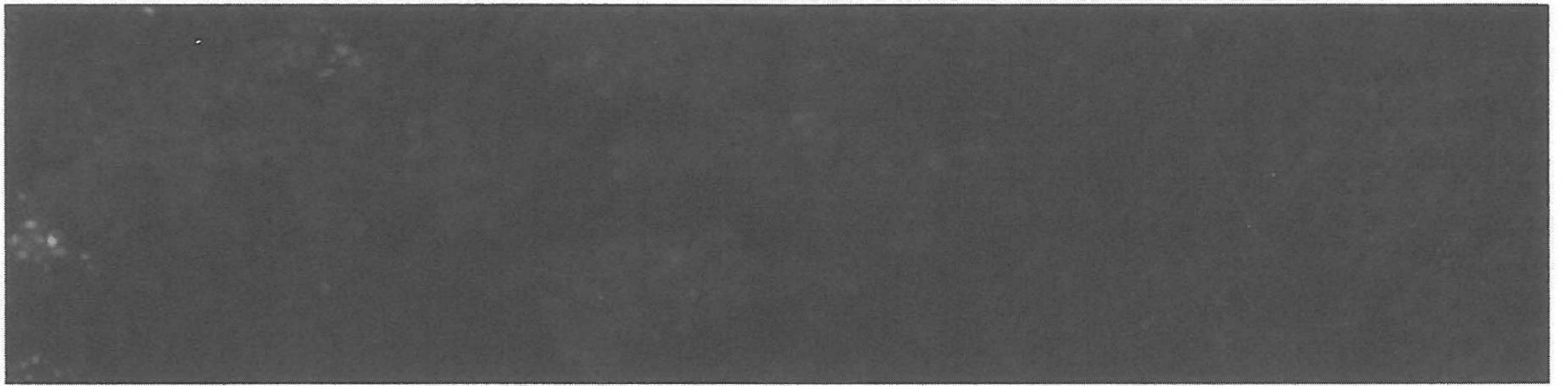
THE RICHMOND MSA HAS A LOW CRIME RATE RELATIVE TO MOST TIER 1 CITIES

VIOLENT CRIME RATES RATE PER 100,000 RESIDENTS, 2016



SOURCE: FBI UNIFORM CRIME STATISTICS, 2016





“We did our research. The millennial generation is going to be 50-plus percent of the workforce in the next few years, and they want to live in urban areas. They want to be downtown. They want to work in a state-of-the art space. We like that we can draw from the universities around here.

CODY PHIPPS
PRESIDENT AND CEO, OWENS & MINOR





SOUTHERN HOSPITALITY

As Greater Richmond has evolved into an urban, dynamic city, it has maintained its centuries-old legacy of southern hospitality, becoming a destination for foodies, with fantastic restaurants and craft beverages.

We offer ample hotel space of varying rates and amenities for Amazonians' guests and families. A regional hotel company has committed to building a hotel of sufficient size, scope, and service level for Amazon – as near to the campus as desired.

No.1

for Food Travelers
National Geographic (2016, 2017)

6th *Best City for
Brunch in the U.S.*

Travel + Leisure

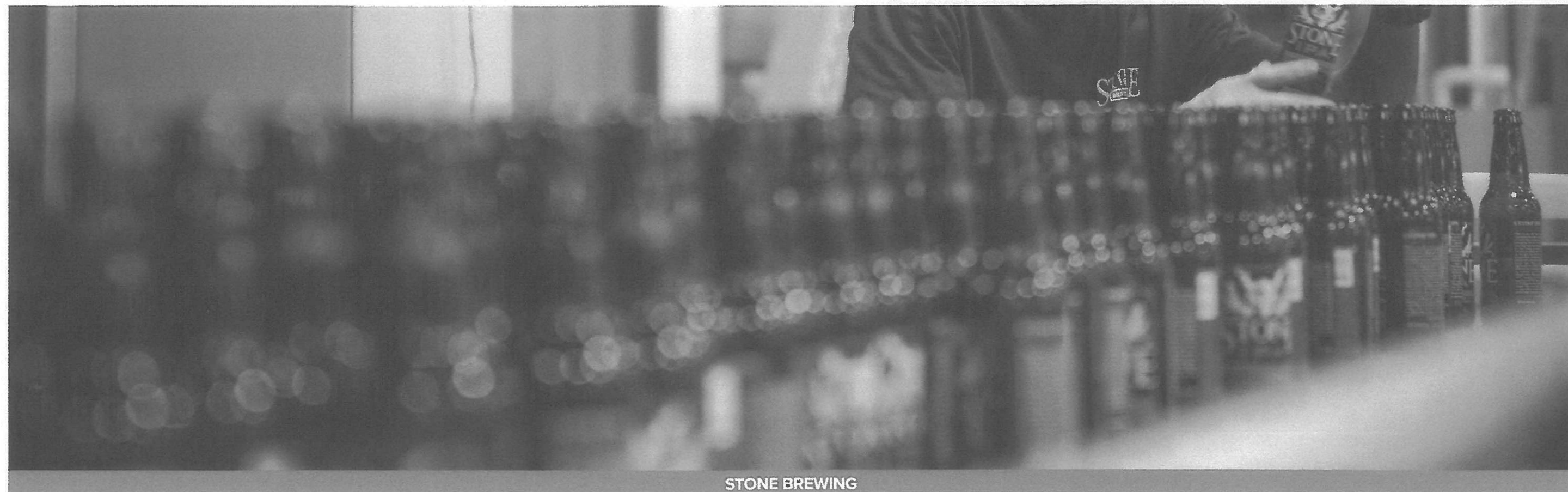
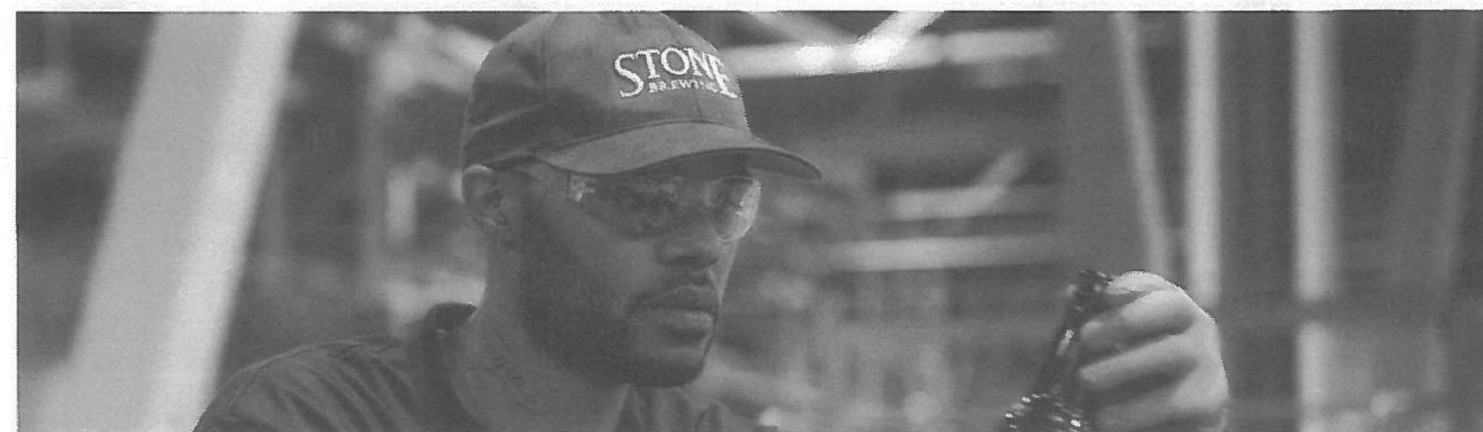
2,300+

restaurants within
40-minute drive of Richmond

25 *breweries* 3 *wineries*
3 *cideries* 2 *distilleries*

“The search for our site eastward has not been an easy feat. We had a very structured process with qualitative and quantitative data. We had over 300 submissions, visited over 40 sites, gave ourselves four months to do it in. We were really excited to announce in 2014 our selection of Richmond, Virginia as the next site of our production facility, which will sit on 14 acres, our packaging hall, and, ultimately, our Stone World Bistro and Gardens.”

PAT TIERNAN
COO, STONE BREWING CO.



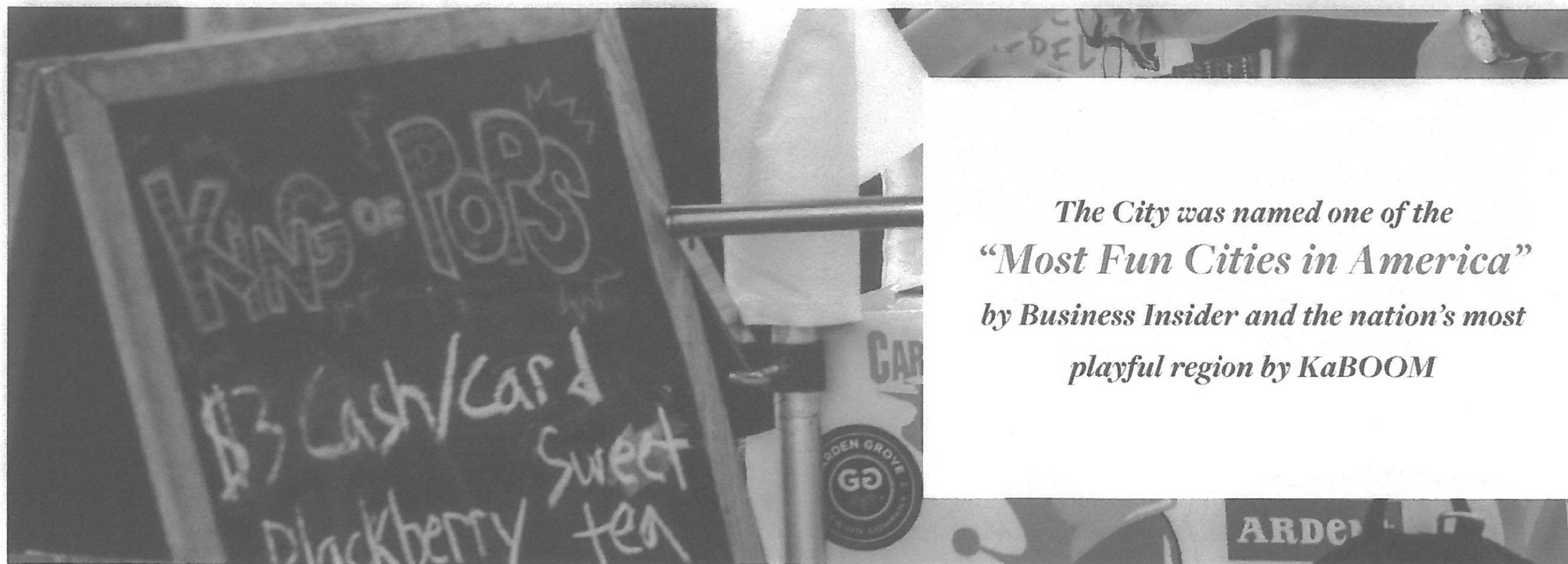
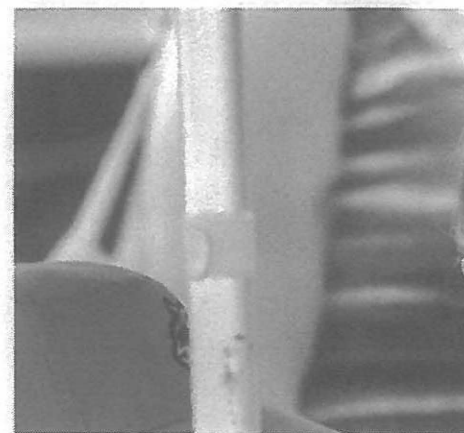
STONE BREWING



A CITY OF CULTURE: ARTS, FESTIVALS, AND MOVIES

Residents and the media agree — Richmond is as good a place to play as it is to live.

We are home to a thriving arts and music community. Our rich culture scene is complemented by our maker scene that breeds an entrepreneurial spirit and brings ideas to market.



*The City was named one of the
“Most Fun Cities in America”
by Business Insider and the nation’s most
playful region by KaBOOM*

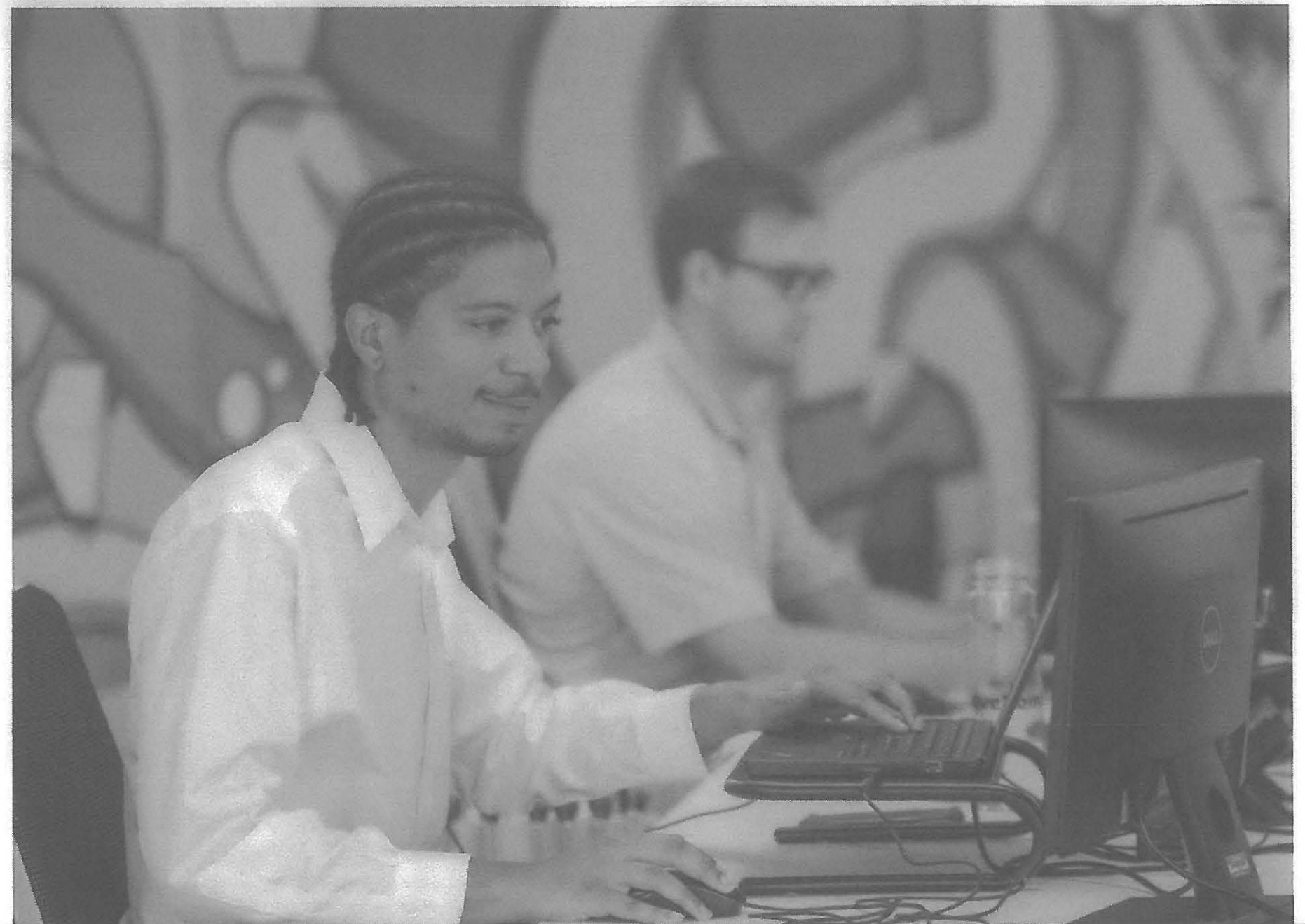


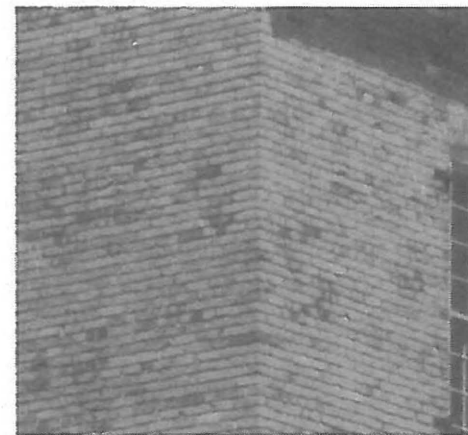
*Top 20 “Most Vibrant Arts
Communities in America,”
one of the “Top Music Meccas
of the South,” and one of the
“Best American Cities for
Creatives.”*



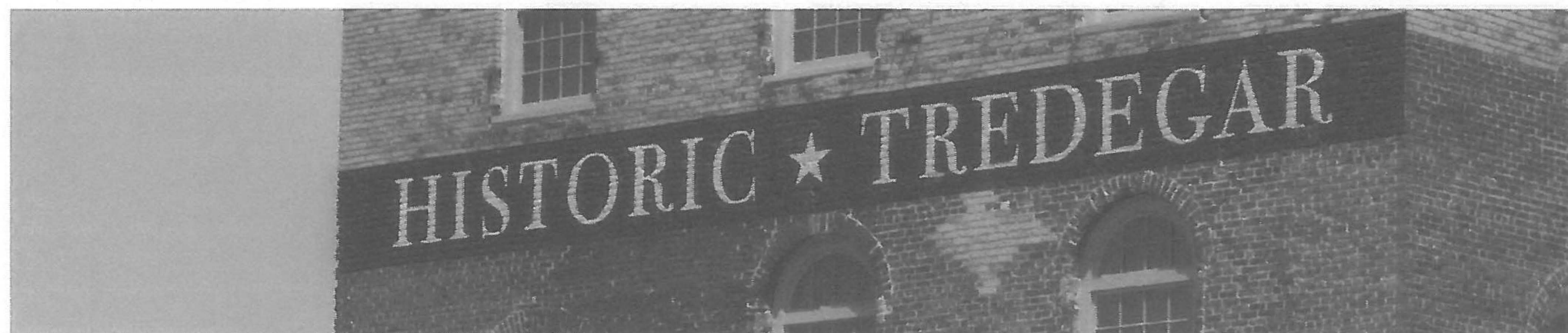
*At VCU's Da Vinci Center,
the disciplines of arts, engineering,
business, and humanities/sciences are
brought together under one roof to bring
products to life.*

Our arts reputation is grounded in our world-class art education – VCU School of the Arts is ranked second in the country, and VCU Brandcenter offers the top advertising program in the U.S. We also offer a unique blend of industry and art in our maker community. We are home to a fine arts museum, history museums, an opera, a ballet company, several theaters, and marquee concert venues that attract national indie and mainstream bands.





*Richmond has been rated
the sixth-best historic
destination in the U.S.
There are 100+
historical/cultural
sites within 40
minutes of Richmond,
providing a long list of options
for weekend activities.*





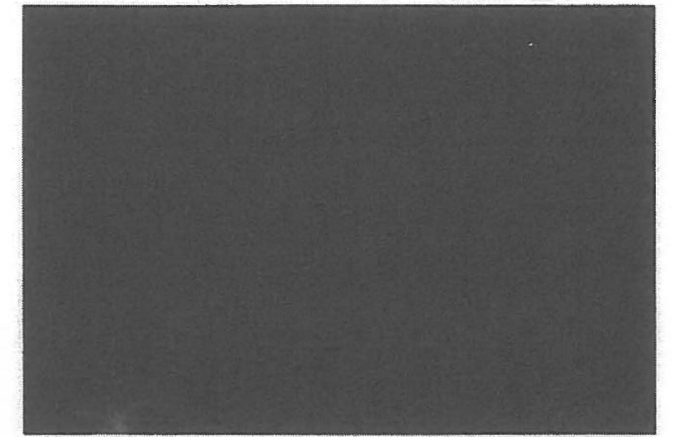
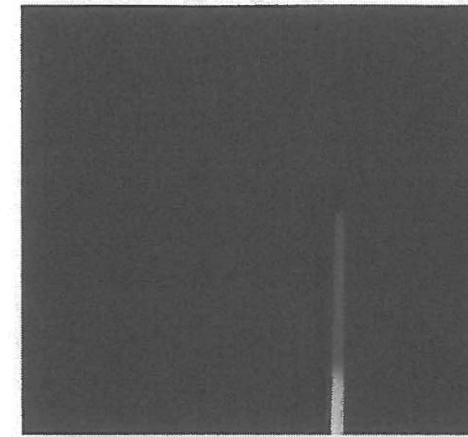
Greater Richmond is also home to 27 festivals of all varieties—whether you're a fan of folk music, Lebanese food, adventure sports, or international boats, we've got a festival for you! Each October (recognized as both Artober and Techtober), Greater Richmond's Annual Makerfest, hosted by the Science Museum of Virginia, attracts thousands of artists, tech enthusiasts, and inventors for a celebration of new ideas. Our collaborative DIY community inspires all Richmonders to embrace tinkering and creation as paths to learning and innovation, which helps advance the STEAM disciplines—science, technology, engineering, art, and mathematics—among children to seed more makers.



*Richmond, Virginia:
A City of Culture
Arts, Festivals, and Movies*

MEN'S JOURNAL, MARCH 2015

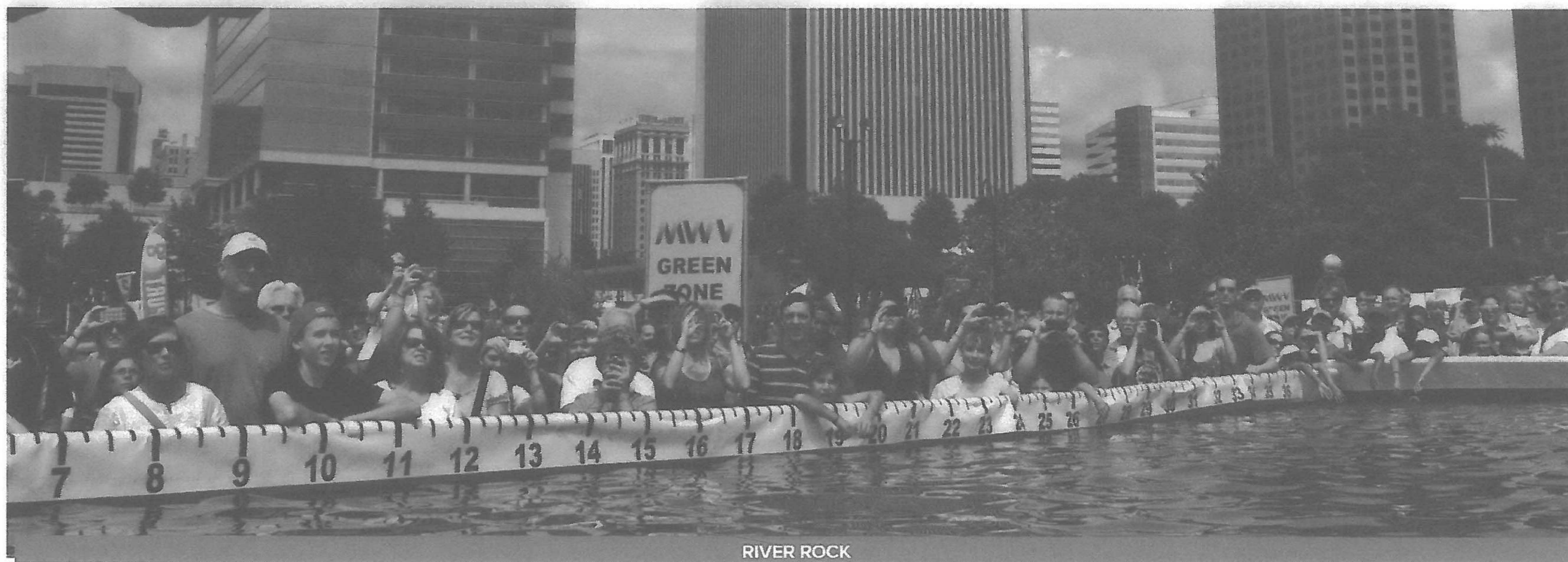
The largest Folk Festival in the U.S. is hosted along the city's riverfront. It attracts hundreds of thousands of people, showcasing musicians, dancers, traditional crafts, storytelling, and food from around the world to celebrate the roots, richness, and variety of American culture.

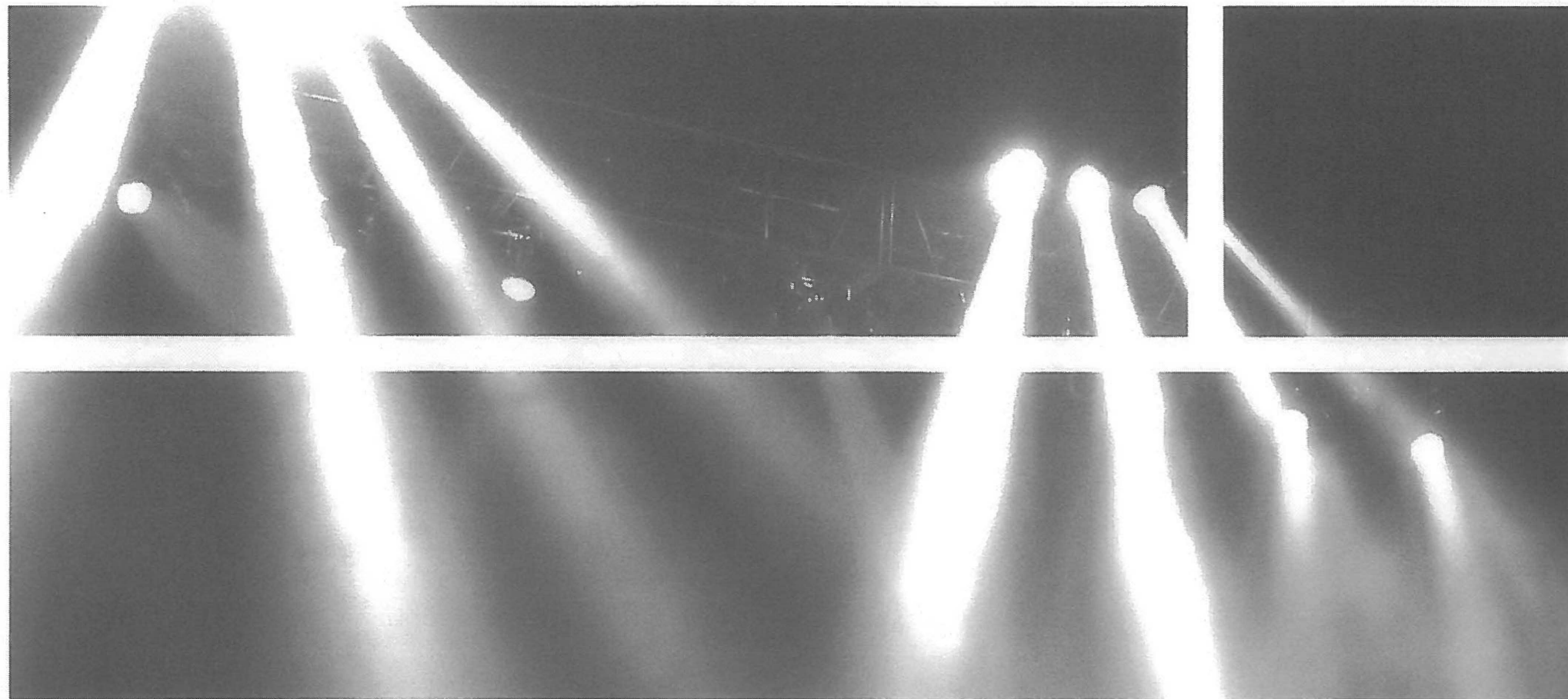


RICHMOND FOLK FESTIVAL



*Each May, Richmond's Brown's Island hosts the annual **Dominion RiverRock**, where 25,000 people (and pets!) participate in competitions like trail running, kayaking, biking, bouldering, slacklining, and even dog jumping.*





*Named one of the
“10 historic venues
any music lover needs
to visit”*

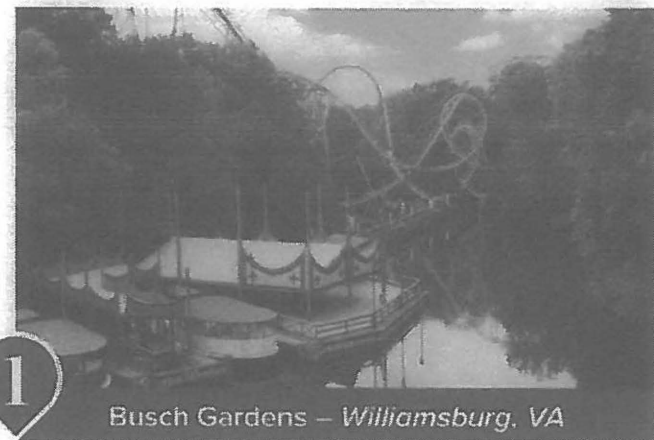
Altpress.com

(January 2017)





Greater Richmond is a weekend warrior's paradise. Given our central Virginia location on the James River, cultural, outdoor, and hospitality options are right outside your front door or only a short drive away. Outdoor lovers can set off to Shenandoah National Park in the west, Virginia Beach in the east, white water kayaking at Great Falls, or stay home and enjoy kayaking or rafting on the James River that runs through our city. For culture and cuisine lovers, there's everything from the Virginia Museum of Fine Arts in downtown Richmond to the wineries of rural Virginia, and resorts and award-winning boutique hotels and restaurants like the Michelin star-rated Inn at Little Washington.



1

Busch Gardens – Williamsburg, VA



2

Inn at Little Washington – Washington, VA



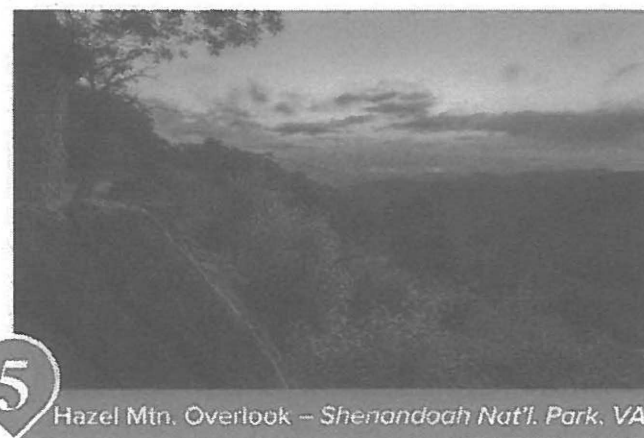
3

Jefferson's Monticello – Charlottesville, VA



4

Virginia Museum of Fine Arts – Richmond, VA



5

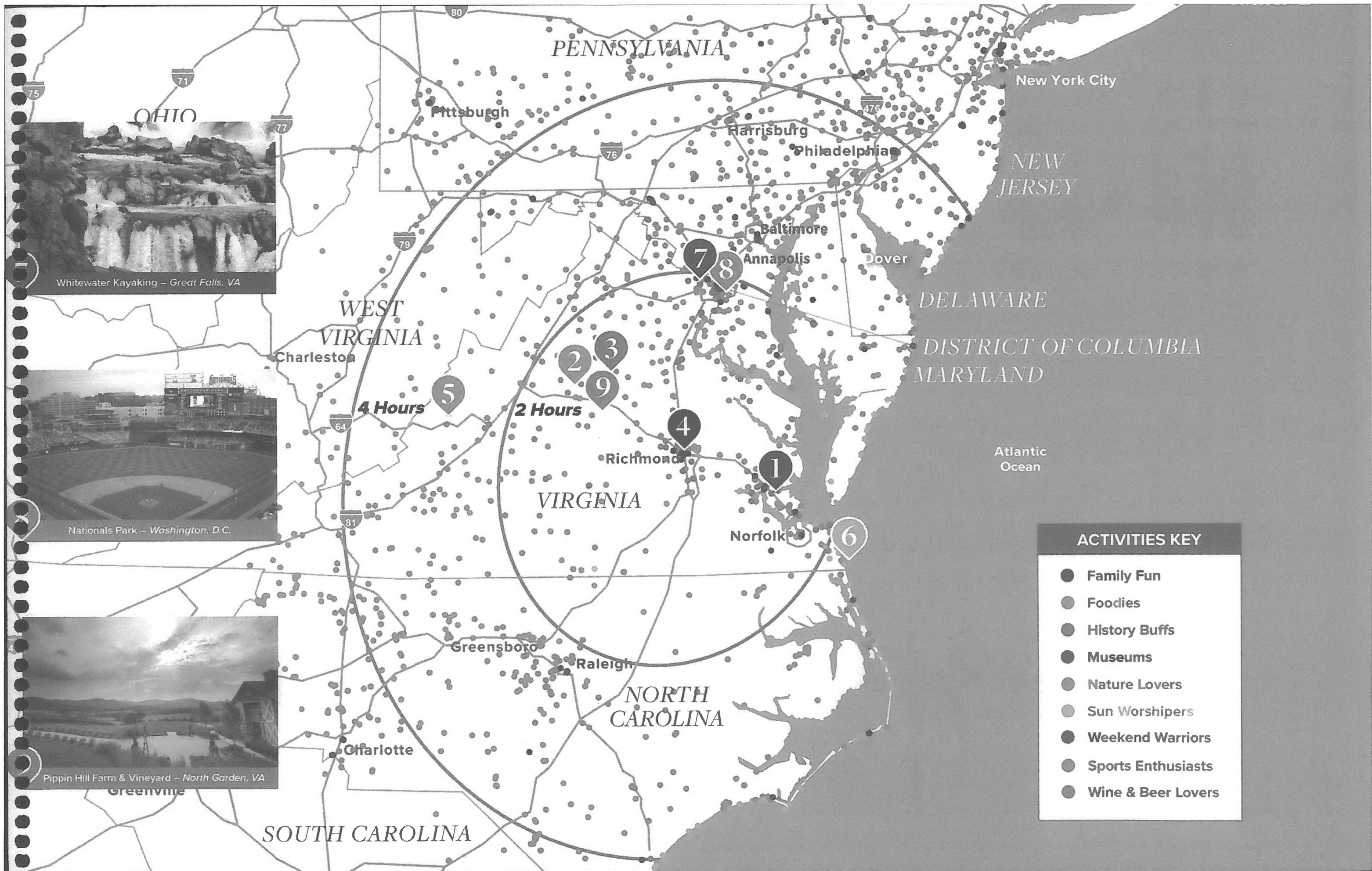
Hazel Mtn. Overlook – Shenandoah Nat'l. Park, VA



6

Virginia Beach – Virginia Beach, VA





OHIO

PENNSYLVANIA

New York City

NEW JERSEY

DELAWARE

DISTRICT OF COLUMBIA
MARYLAND

Atlantic Ocean

WEST VIRGINIA

VIRGINIA

NORTH CAROLINA

SOUTH CAROLINA

Whitewater Kayaking - Great Falls, VA

Nationals Park - Washington, D.C.

Pippin Hill Farm & Vineyard - North Garden, VA

ACTIVITIES KEY

- Family Fun
- Foodies
- History Buffs
- Museums
- Nature Lovers
- Sun Worshipers
- Weekend Warriors
- Sports Enthusiasts
- Wine & Beer Lovers



The Virginia Film Office (VFO) is proud to be recognized as one of the most knowledgeable, effective, and helpful film commissions, worldwide. Greater Richmond has proven to be a popular location for film and production companies because of its authentic streetscapes and the ease of working in this market.

We provide a strong infrastructure for film and have a long list of credits to our name. This region has doubled as D.C., New York City, Revolutionary War, and Civil War locations. In fact, the Showtime series “Homeland” recently moved its production to Richmond, and joins a long list of other notable projects, including AMC’s Turn, PBS’s Mercy Street, and Steven Spielberg’s Lincoln.



*Richmond has been
named one of the
“Top 10 small cities
to be an independent
moviemaker.”*

Moviemaker.com (2017)



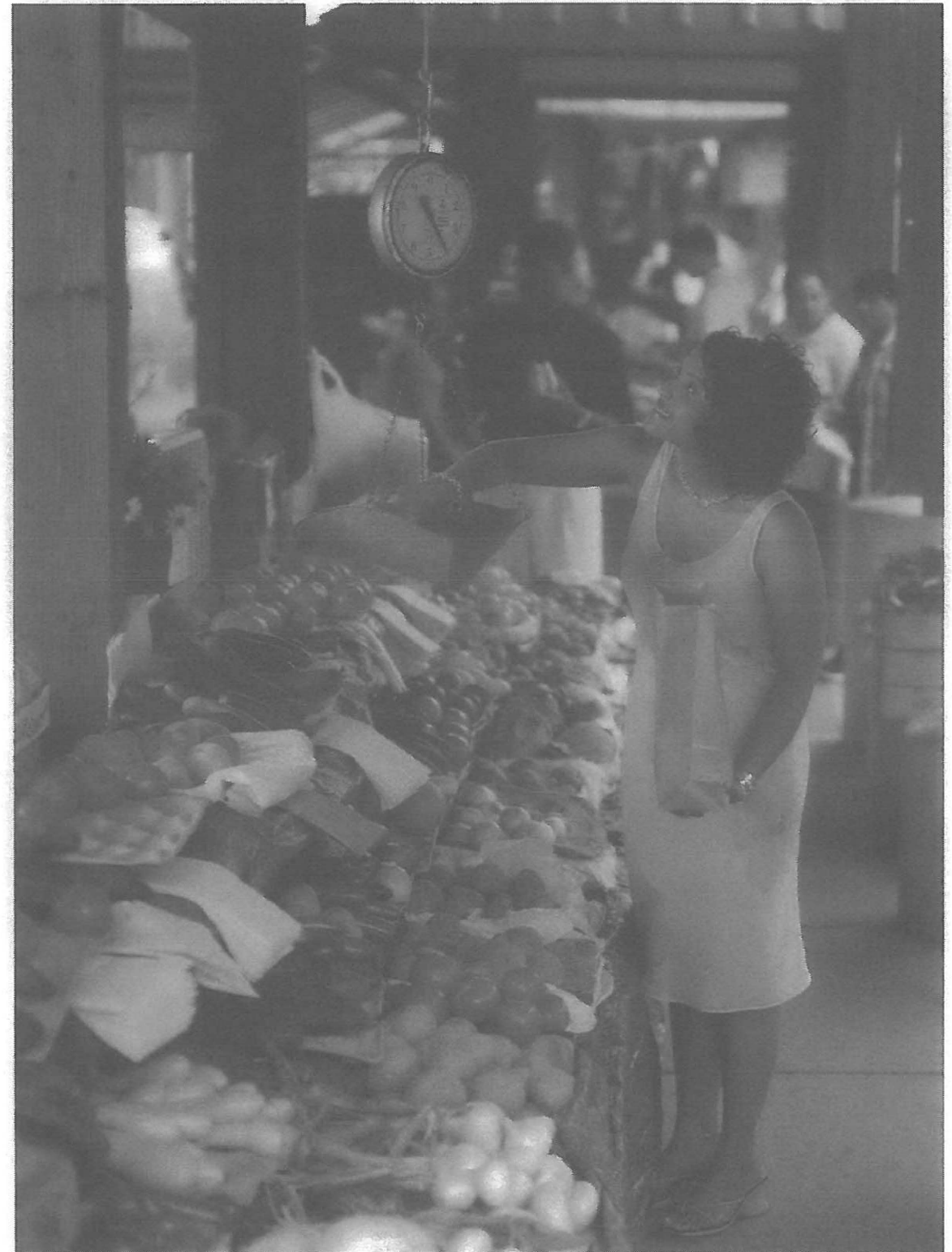


OUTDOORS AND SPORTS

Greater Richmond is a natural outdoor playground for residents and visitors alike, and is ranked as one of the top participatory sports cities in the country.

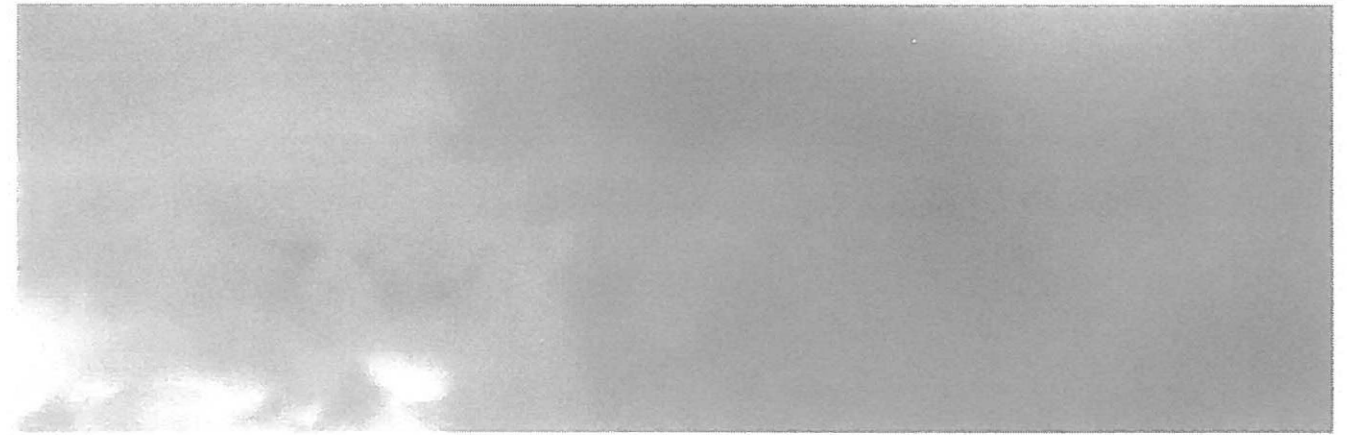
Our region offers outdoor recreation options for all seasons, with mountains 90 minutes to the west and beaches 90 minutes to the east, open spaces, athletic fields, and playgrounds ranging from small pocket parks and tot lots to large urban parks.

The James River Park System is comprised of 10 parks along the James River. It is 550 acres and features the only river flowing through a downtown that has Class IV white water rapids in the country. The James River Park System attracts over one million visitors a year who climb the Manchester climbing wall, hike the trails, mountain bike, picnic on rocks near the rapids, fish from the Manchester Bridge, and kayak, paddleboard, canoe, and raft down the rapids.

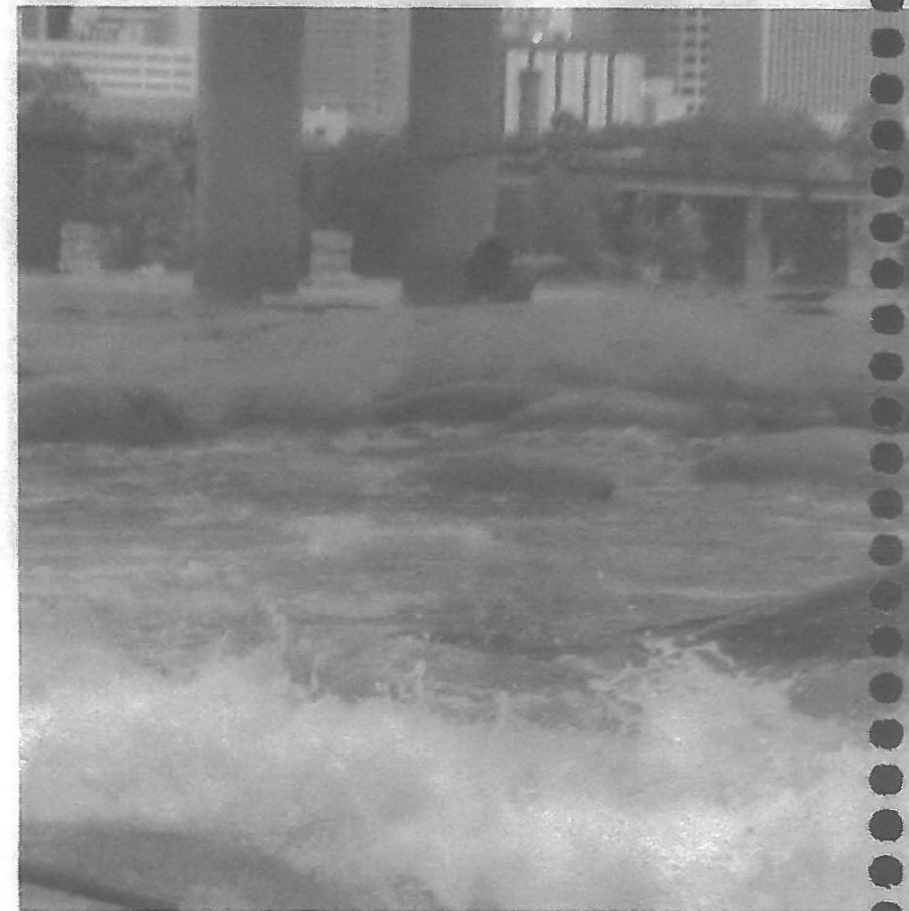




*The James River Park System
was named the Second-Best
Urban Park by Blue Ridge
Outdoors magazine*

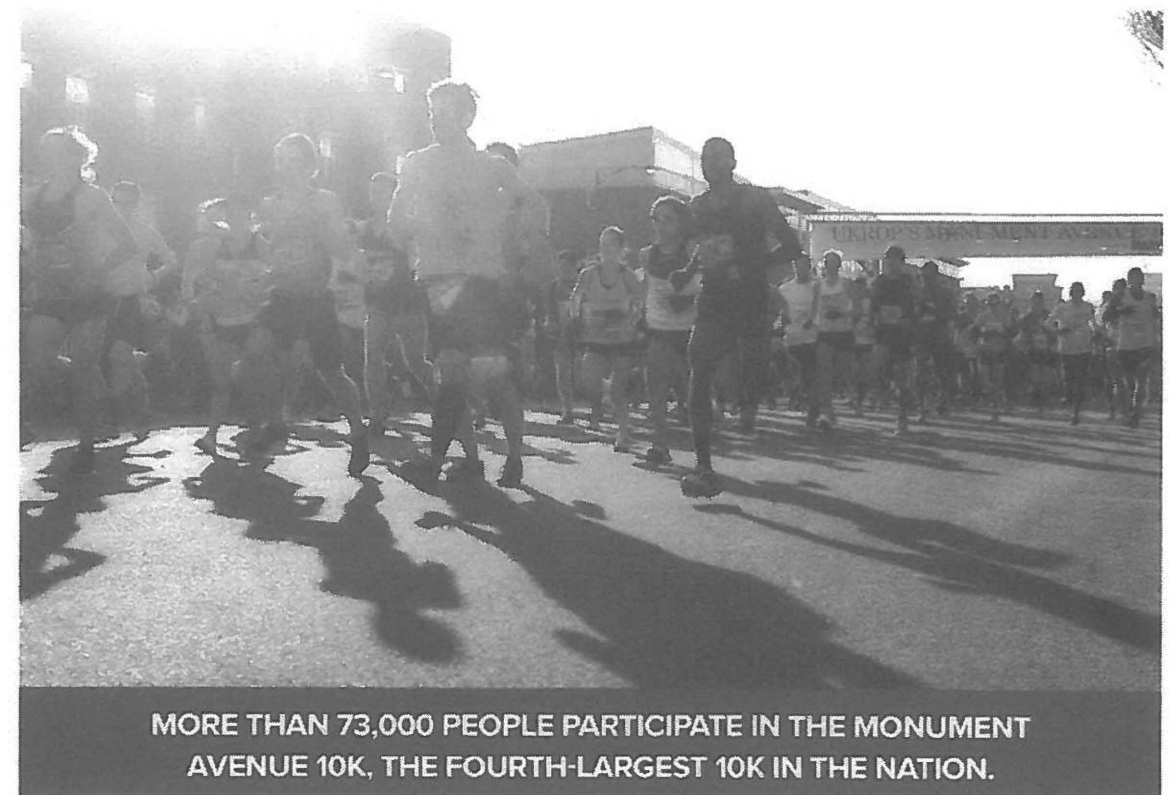
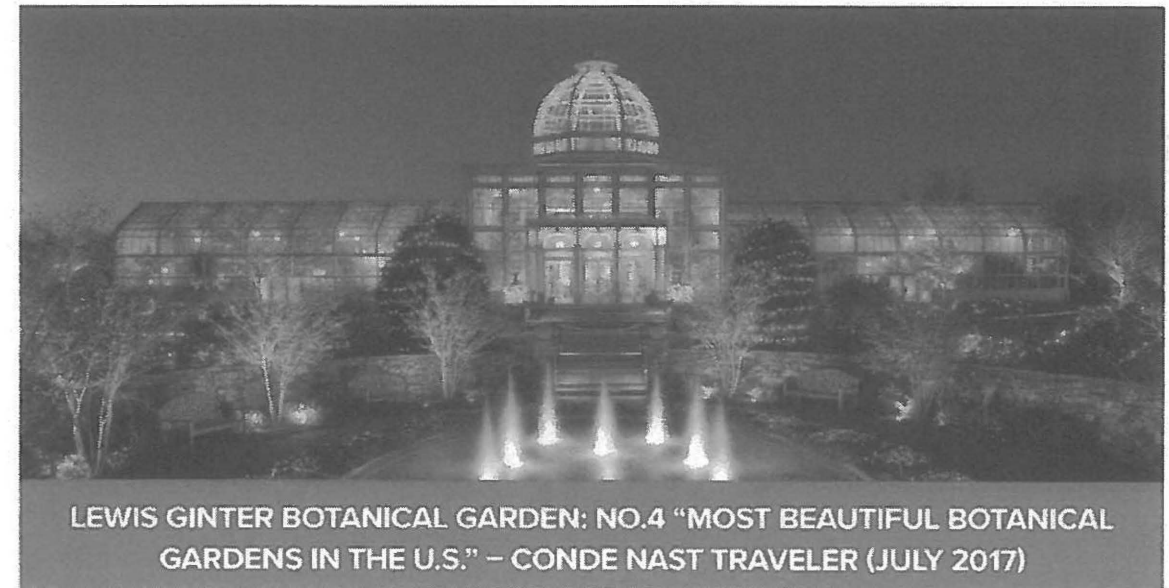


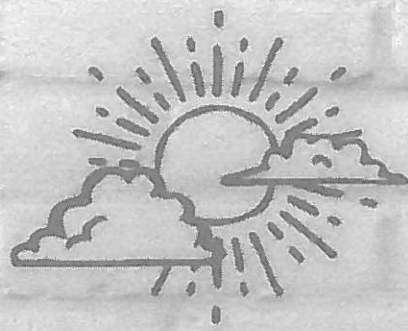
Our historic 52-mile Virginia Capitol Trail bike path connects a wellspring of cultural, natural, and historic resources between the state capital of Richmond and the former colonial capital of Williamsburg. The recently opened trail offers unparalleled history and serenity along the 52-mile trek.



For spectators and athletes alike, Richmond offers many sporting activities to get your heart racing. Fans from all over attend games to root for the region's minor league baseball team, the Flying Squirrels the feeder team for the San Francisco Giants. The Richmond Kickers minor league soccer games offer a convivial family environment with a very strong and growing fan base. The region also hosts two NASCAR races every year, as well as one PGA Tour Champions event (Dominion Charity Classic).

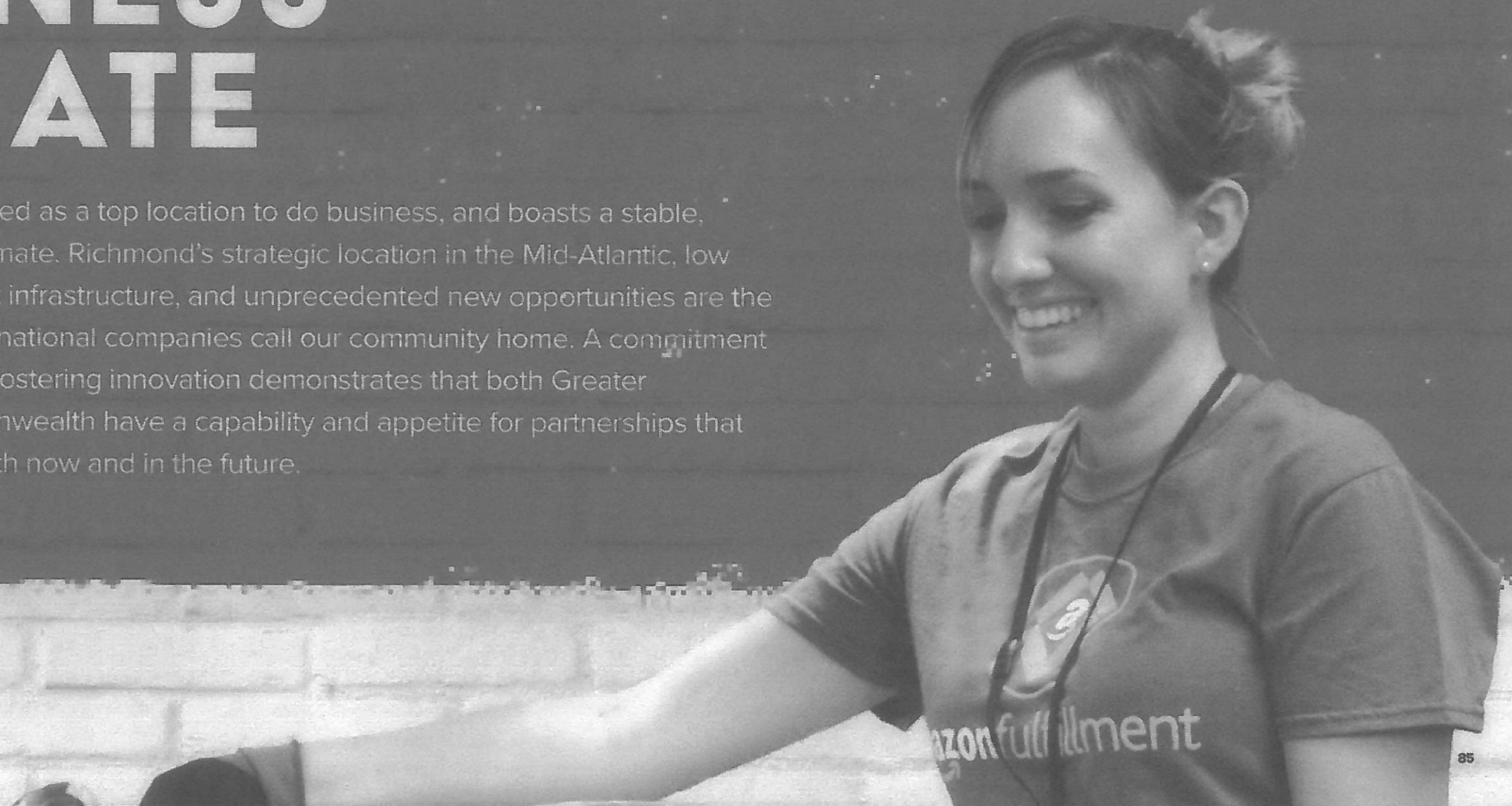
Every year nearly 2,000 people train with the Sportsbackers Training Teams for the annual Richmond 8k, half-marathon, and full marathon in November. Known as one of the top tennis towns in the country, and the hometown of legendary tennis player Arthur Ashe, there are more than 138 tennis courts throughout the city.





BUSINESS CLIMATE

Virginia is consistently ranked as a top location to do business, and boasts a stable, consistent pro-business climate. Richmond's strategic location in the Mid-Atlantic, low costs for operations, robust infrastructure, and unprecedented new opportunities are the reason many U.S. and international companies call our community home. A commitment to sustainable growth and fostering innovation demonstrates that both Greater Richmond and the Commonwealth have a capability and appetite for partnerships that drive business success, both now and in the future.





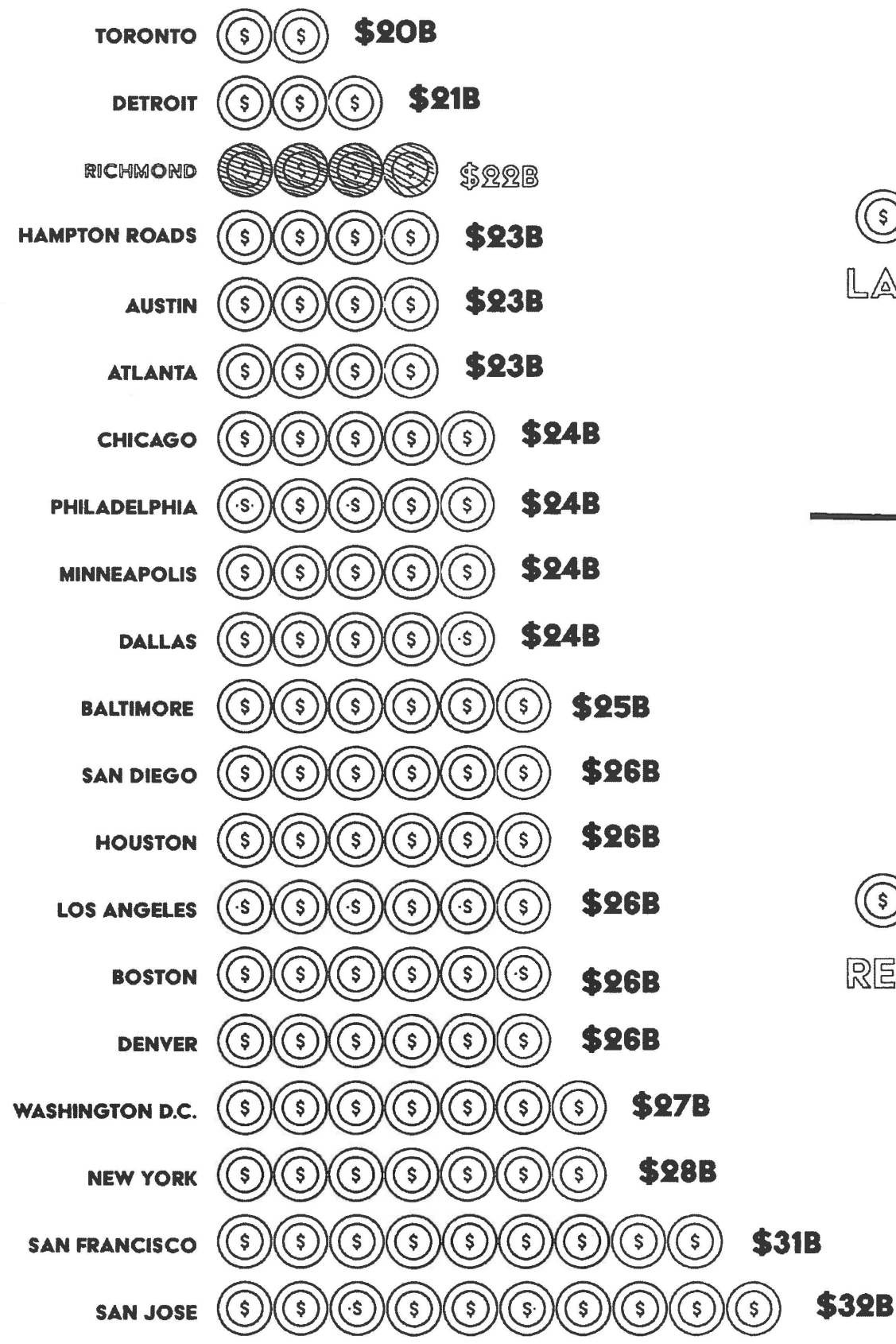
SHARED PASSION FOR FRUGALITY

Richmond's affordability is one of its strongest assets, and sets us apart from other talent hubs around the country. Our cost of doing business is lower than major MSAs (Cost of Doing Business Index score of 90), which is estimated to save Amazon up to \$10B in rent and labor costs over a 10-year employment ramp-up relative to places like New York, San Jose, Denver, or Boston. Dominion Energy's rates for industrial customers are 34% below the U.S. average at 5.44 cent/kwh.

“We were squeezed in Washington and needed additional space, the space here in Richmond costs one third of what it costs for equivalent space in D.C.”

BOB SCHULTZE,
PRESIDENT AND CEO, ICMA-RC

RICHMOND
HAS A COST
OF DOING
BUSINESS
ADVANTAGE
OVER MOST U.S.
LOCATIONS



- 4% SENIOR MANAGEMENT
- 20% ANALYST
- 20% F/A STAFF
- 36% SOFTWARE/IT
- 20% SUPPORT



Space requirements

2019

500,000 SQ
FT / 3,125 FTE

2027

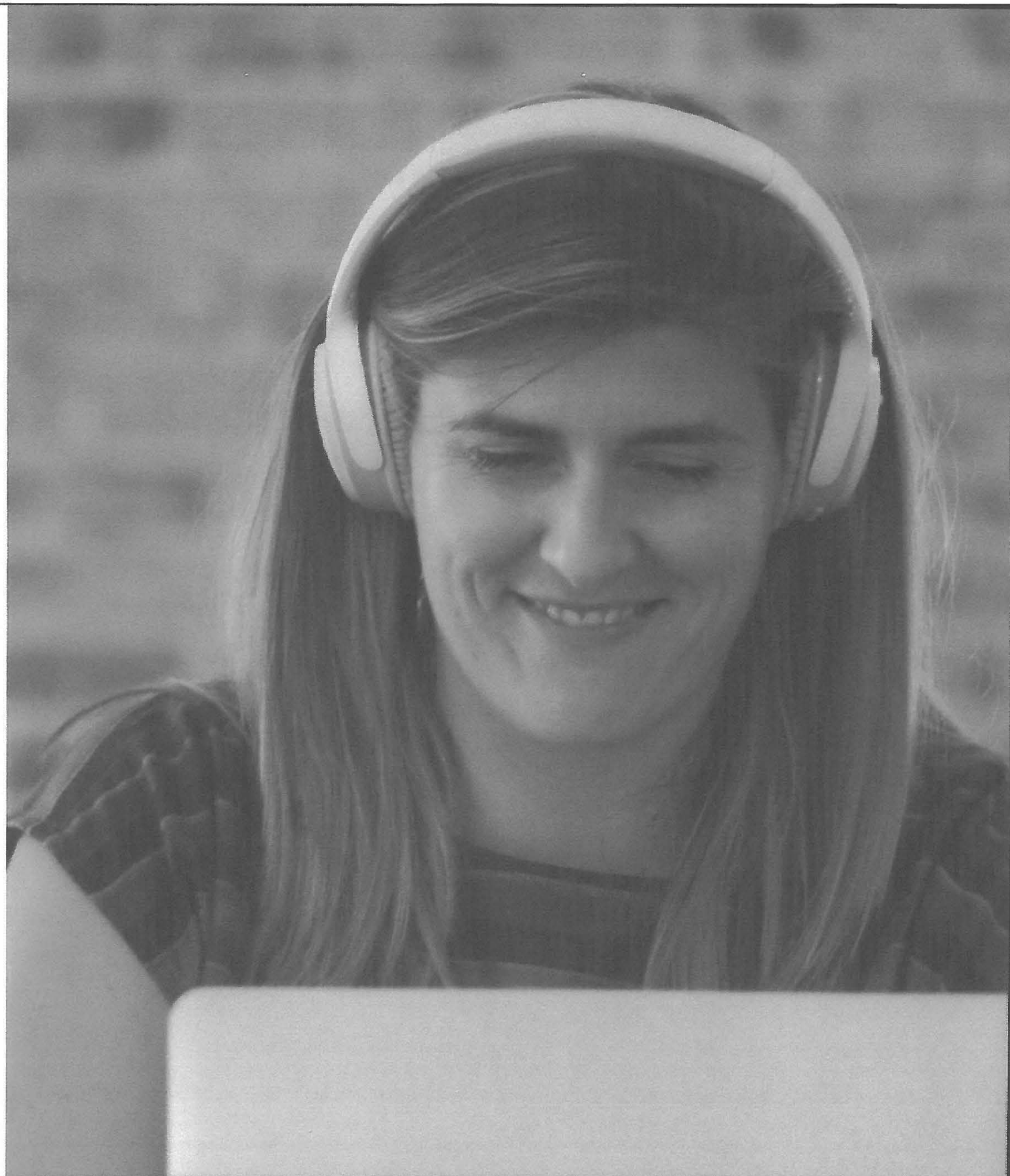
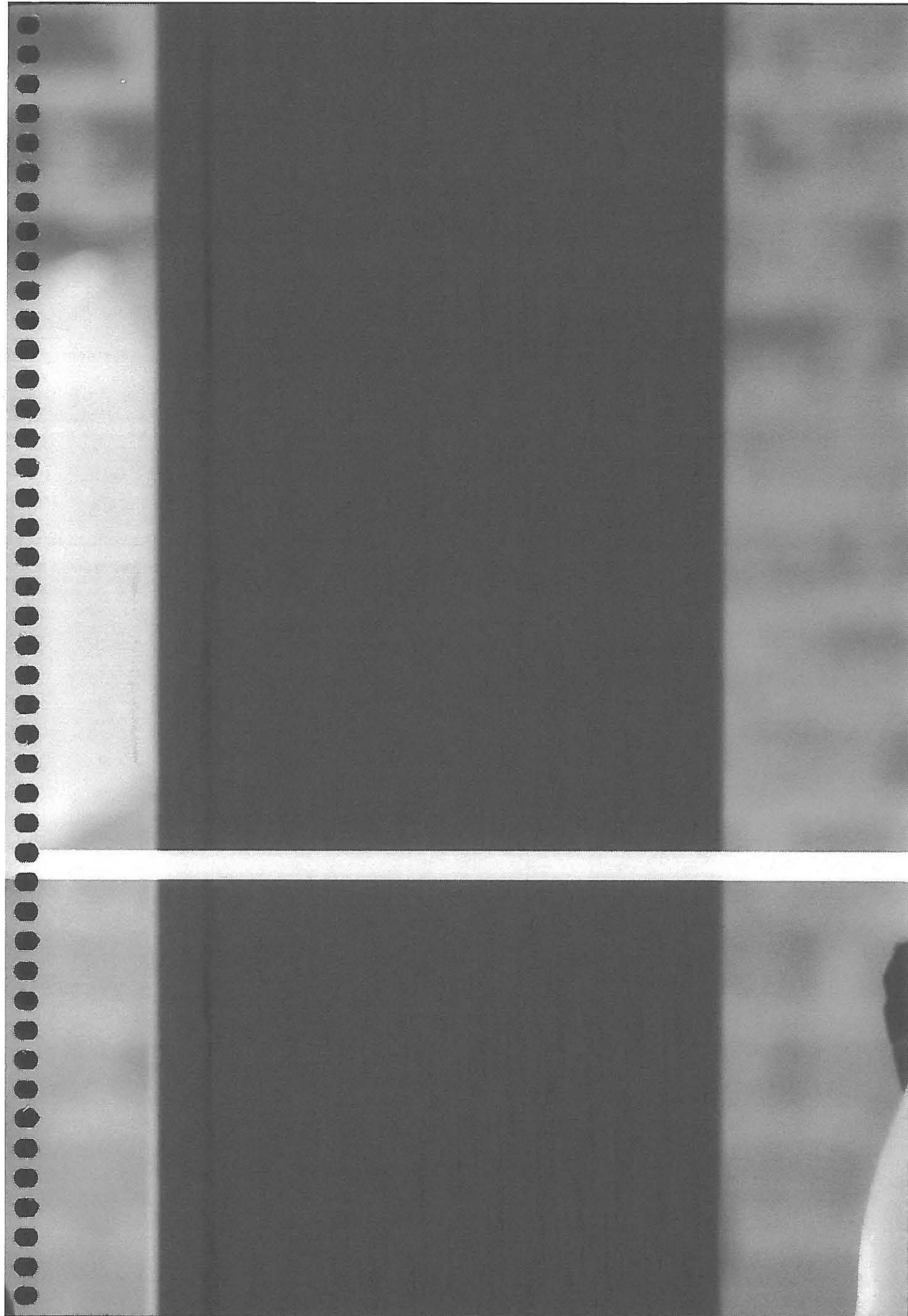
8 MIL SQ FT
/50,000 FTE

SOURCE: BUREAU OF LABOR STATISTICS 2016; CUSHMAN & WAKEFIELD

“We brought our business to Virginia after a national search for locations in which to centralize all of our business functions ... we were looking for a city that could reduce our operating costs, but at the same time offer a quality of life to entice some of our more tenured employees to relocate to the new site with us.”

DAVID MILLS
SENIOR VICE PRESIDENT & CORPORATE SECRETARY, “K” LINE AMERICA





EASE OF DOING BUSINESS

In addition to our low cost of doing business, Greater Richmond has business-friendly policies that reinforce the state's commitment to economic success and growth. Virginia continues to rise to the top nationally as a place to do business because of our tax and regulatory policies. We also make it easier for companies to access the depth of talent available in surrounding areas by not imposing local hiring quotas.

Virginia
has ranked
No. 6 in Forbes

*No. 7 in CNBC's
top states to do business*

No. 12

in nation for corporate
HQ taxes, according
to the Tax Foundation

Virginia has a
6%
corporate income
tax rate

Virginia ranked
third for

*best
regulatory
environment*

including labor regulation,
tax incentives, health insurance
mandates, and occupational
licensing, on the Forbes
2016 Best States for
Business rankings



“*Richmond provided the right combination of access to talent and infrastructure, a highly favorable business climate, and convenient location. Virginia’s state and municipal governments are great partners for any business looking to grow.*”

ROB ALEXANDER,
CIO, CAPITAL ONE FINANCIAL CORP



SUSTAINABILITY

We are deeply committed to driving environmental excellence across the region. Our local governments are consistently working to guide sustainability efforts. We are already putting forward ambitious plans to reduce greenhouse gas emissions by 80% before 2050.



VIRGINIA NOW RANKS EIGHTH IN THE 2016 USGBC'S TOP STATES FOR LEED,
WITH 18,444,309 CERTIFIED GROSS SQUARE FOOTAGE ACROSS THE COMMONWEALTH.



“When considering new data center locations, we not only look for clean and renewable energy solutions, but great partnerships within the local community, a strong pool of local talent, excellent access to fiber, and a robust electric grid. Henrico County and the Commonwealth of Virginia has it all.”

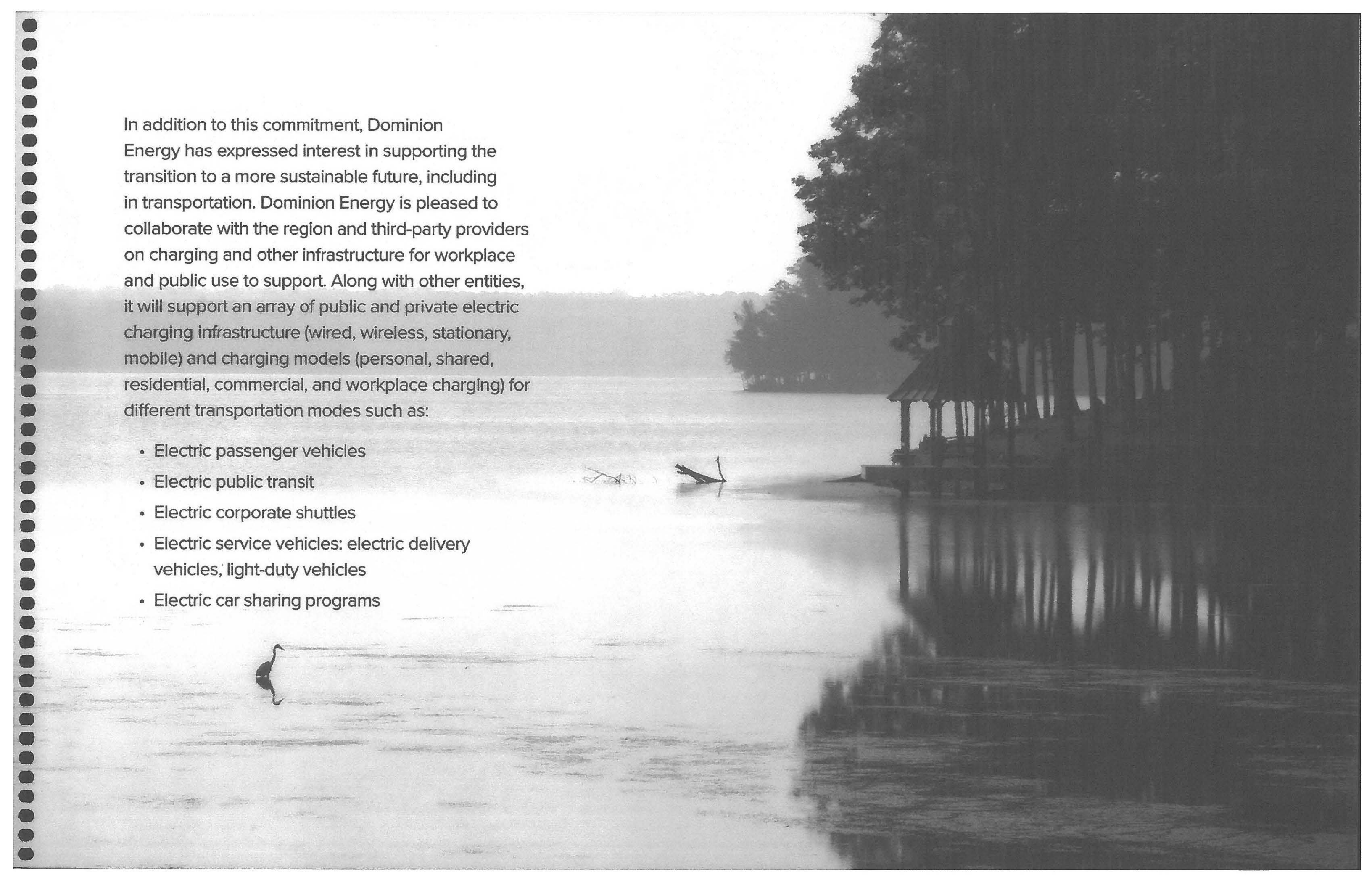
RACHEL PETERSON,
DIRECTOR OF DATA CENTER STRATEGY,
FACEBOOK (OCTOBER 2017)

SOLAR INSTALLATIONS IN THE COMMONWEALTH HAVE INCREASED NEARLY 1,200% IN THE PAST YEAR, WITH REVENUES IN THE GROWING CLEAN ENERGY SECTOR INCREASING FROM \$300M TO \$1.5B BETWEEN 2014 AND 2016.



Dominion Energy has committed to ensuring 100% green energy to Amazon's campus for any site Amazon selects, and has existing plans to expand current renewable production. Currently, Dominion has more than 400-megawatts of renewable energy on the grid and is expected to meet Virginia's goal of 15% power coming from renewables by 2025.





In addition to this commitment, Dominion Energy has expressed interest in supporting the transition to a more sustainable future, including in transportation. Dominion Energy is pleased to collaborate with the region and third-party providers on charging and other infrastructure for workplace and public use to support. Along with other entities, it will support an array of public and private electric charging infrastructure (wired, wireless, stationary, mobile) and charging models (personal, shared, residential, commercial, and workplace charging) for different transportation modes such as:

- Electric passenger vehicles
- Electric public transit
- Electric corporate shuttles
- Electric service vehicles: electric delivery vehicles, light-duty vehicles
- Electric car sharing programs



STABLE PARTNERS FOR INCOMING CORPORATIONS

Virginia's business-friendly policies and support for sustainability are in our DNA and here to stay, with both state and regional governments committed to protecting them. In fact, our regional and statewide leaders continue to provide a solid foundation of stable business stewardship and commitment to innovation that transcends partisan changes in the state's political leadership.

Our political stability can be a critical asset for Amazon as you write the next chapter. Amazon also has a clear and willing partner in the Virginia Economic Development Partnership (VEDP), which is insulated from political changes, and can serve as the single point of contact to help Amazon navigate any legal, regulatory, or financial challenges as it grows in the state.

The Richmond MSA's geographical location offers Amazon close proximity to state government and most federal government agencies within a two-hour drive.



Virginia's state government ranks

2nd

in the Leading States Index for
measures of the quality of state
administrative functions, and is
committed to maintaining its

AAA

government credit rating.



Greater Richmond's attractive, stable business climate has prompted many corporations to establish operations here: Eight Fortune 500 companies and 30 Inc. 5000 companies are proud to call Greater Richmond home. Our business ecosystem hosts >150 employers of more than 500 people, offering a variety of employment opportunities for Amazonians' spouses and family members.

We have also recently experienced a surge of entrepreneurial, innovative companies moving to Greater Richmond. Twenty-nine new information technology or high-tech manufacturing companies (amounting to 2,100 jobs and \$152M in new investment) have come in over the last five years. Some companies are also expanding operations from the D.C. metro area to Richmond to take advantage of the lower cost of doing business.

Virginia is also the first state to pass a law allowing personal delivery devices on sidewalks and crosswalks, and is on the cutting edge of autonomous vehicle travel.

In fact, Governor McAuliffe has declared the Commonwealth of Virginia "open for business" to testing connected and autonomous vehicles. Currently, there is work underway to develop connected vehicle and autonomous vehicle technology along the I-95, I-495 and I-66 corridors in the state. This is already in the build/test phase, with a focus on providing services like advance traveler warnings of accidents/backups. Drone testing is underway as well – Google has tested drone delivery of Chipotle burritos in Blacksburg, and universities partnered with technology companies to test medicine delivery to the rural region of Southwest Virginia.



Capital One's office in Richmond
has >11,000 employees



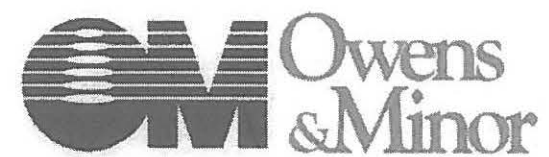
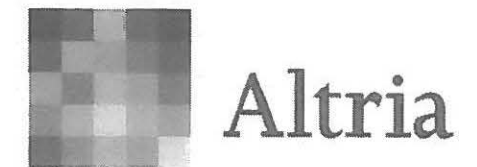
**NORTHROP
GRUMMAN**

General Electric and Northrop Grumman also have
500+ employee footprints in Richmond



CoStar Group™

Commercial real estate researcher
CoStar Group moved its research headquarters
to Richmond in 2016



A PARTNER IN INNOVATION

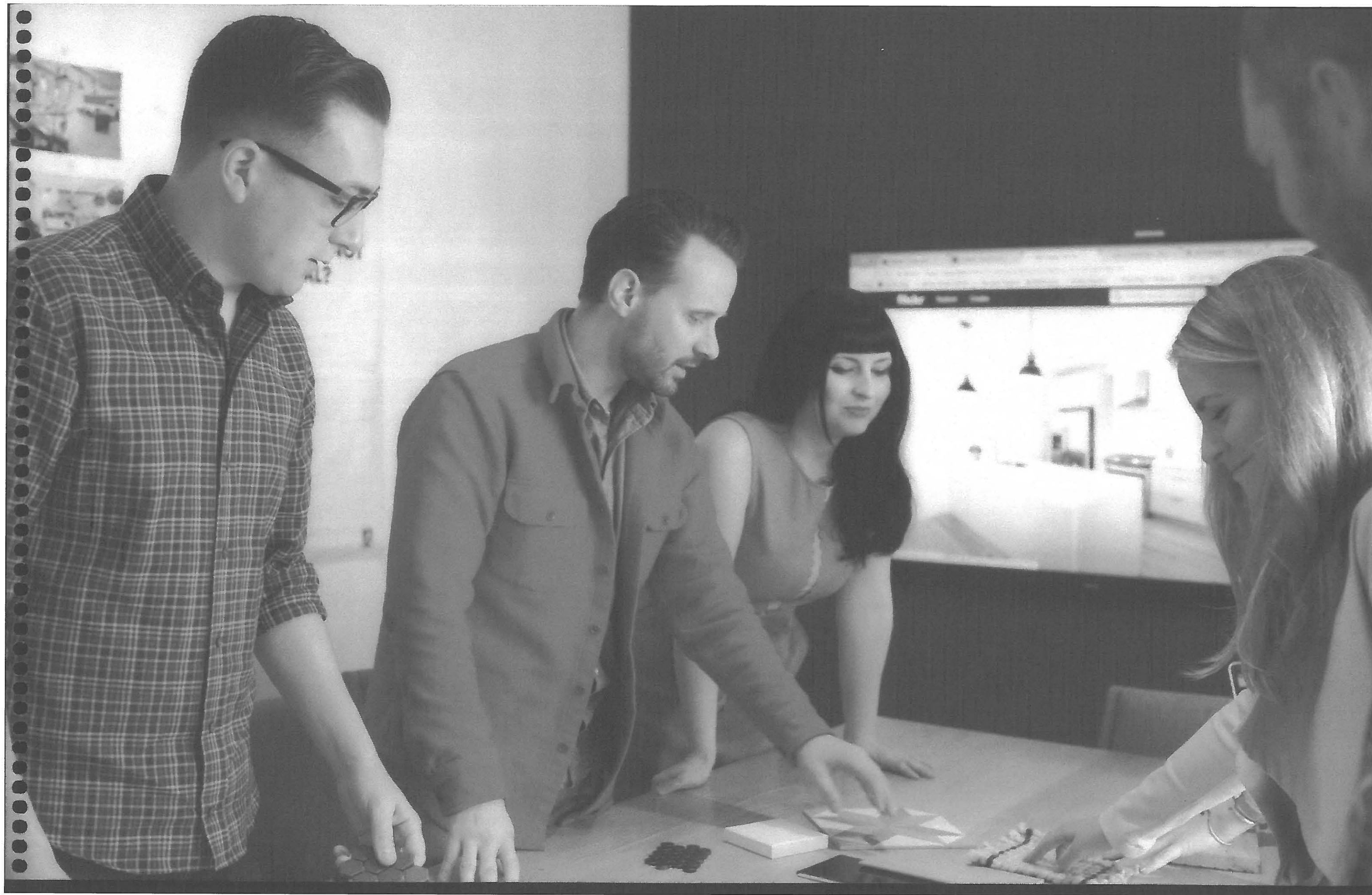
Moving forward, Greater Richmond is ready and able to partner with Amazon as you move technology and business into the future. We as a region (and a state) will help you grow here and work with you on building a shared vision where we test and learn together in a living laboratory of innovation.

Both Greater Richmond and Virginia have a recognized innovation environment. The Commonwealth is ranked the No.7 most innovative state by Forbes, and boasts an extensive number of existing innovation assets, including:

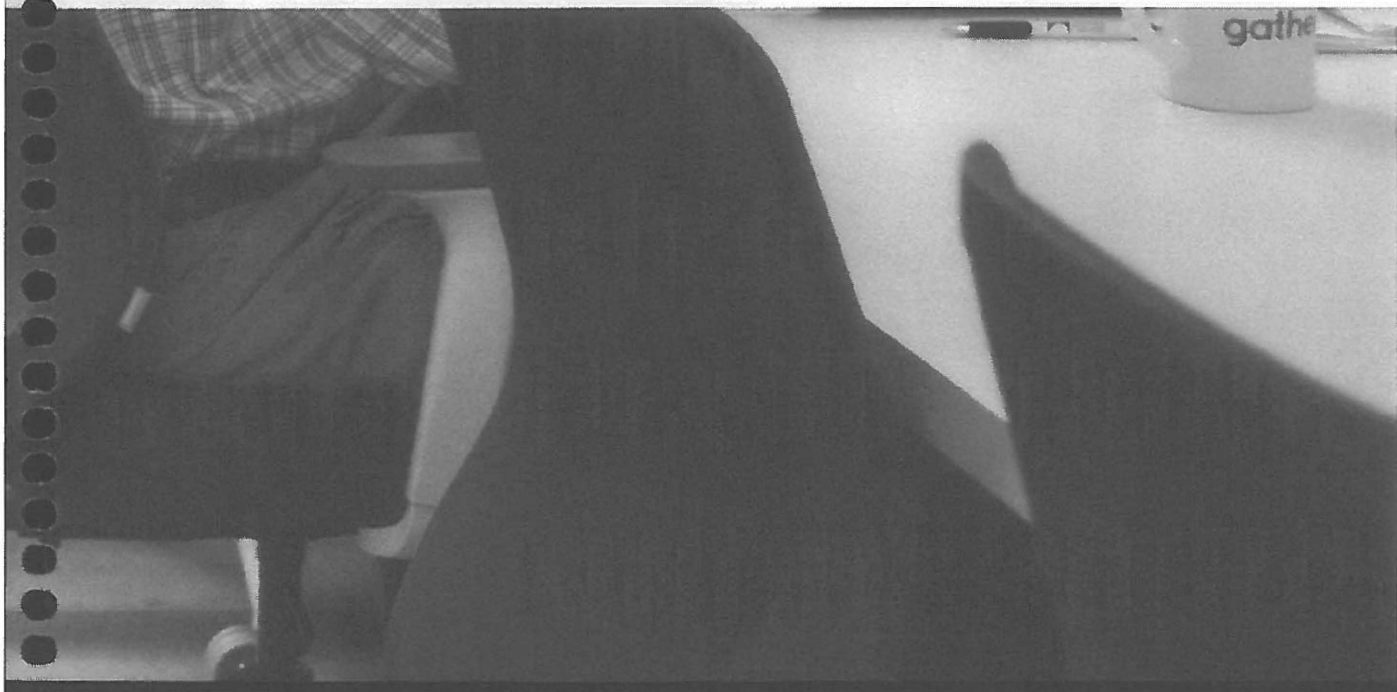
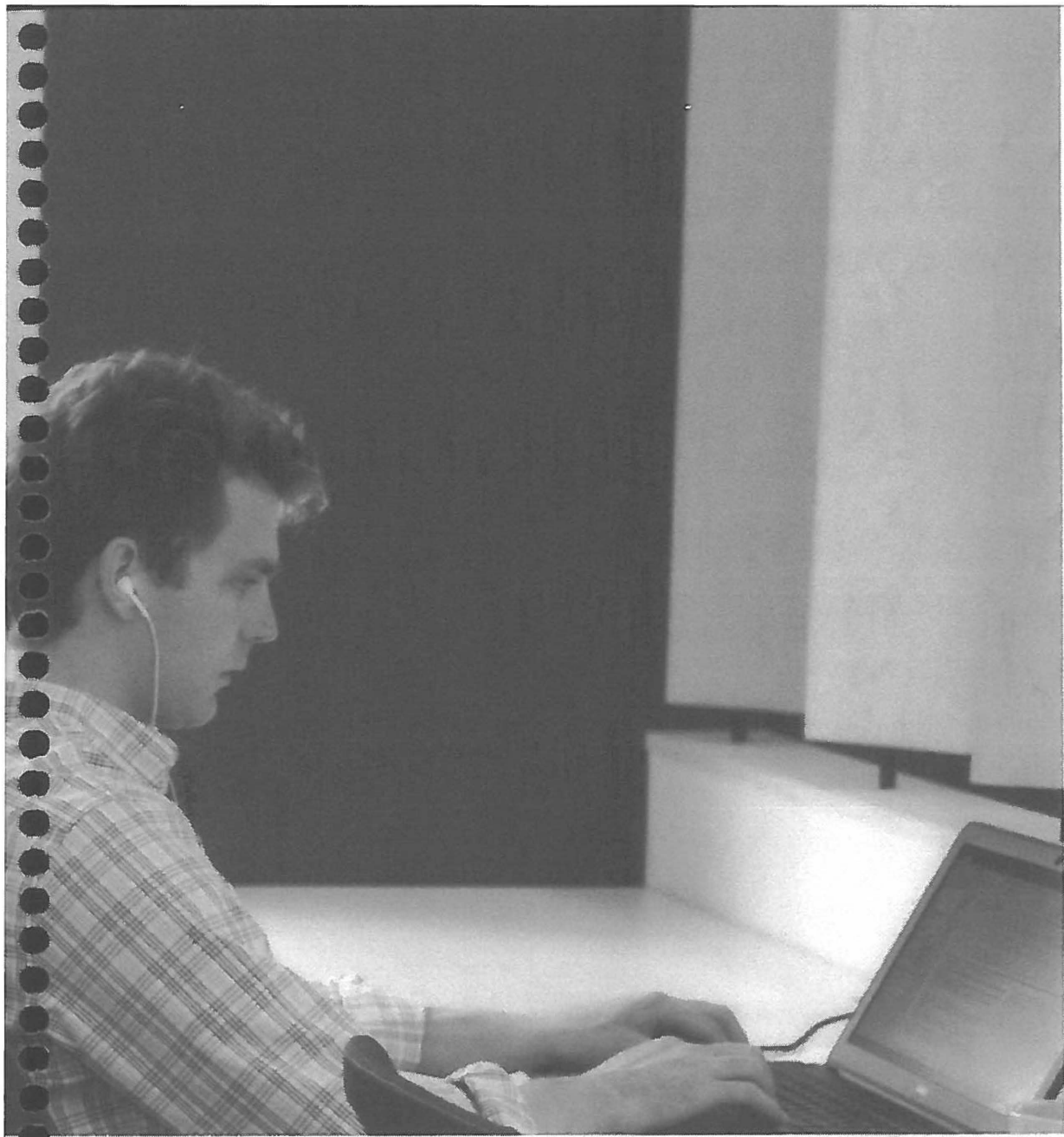
- A new runway for unmanned aircrafts at NASA's Wallops Flight Facility
- The 2.2-mile closed Smart Road testing site with weather controls owned by Virginia Department of Transportation (VDOT)
- One of six FAA-designated drone testing sites in Blacksburg
- One of 10 FAA-licensed spaceports in the country at NASA's Wallops Flight Facility, already in use by commercial partners for testing/business
- Unmanned systems labs and tracks in Hampton Roads

OUR CITY IS FULL OF ENTREPRENEURS, WITH >1 STARTUP FOR EVERY 1,000 RESIDENTS, AND IS RANKED BY FORBES AS A TOP 10 UP-AND-COMING CITY FOR ENTREPRENEURS. WE ARE ALSO PROUD TO BE NAMED ONE OF EIGHT 'CITIES WHOSE ENTREPRENEURSHIP COMMUNITIES ARE BOOMING,' AND ONE OF THE TOP 20 PLACES TO START A BUSINESS.









*Innovation and commerce are part
of the Commonwealth's DNA.*

**REGINALD MCKNIGHT,
HEAD OF U.S. INFRASTRUCTURE PUBLIC POLICY,
FACEBOOK**



At a local level, our innovative and entrepreneurial ecosystem provides support from ideation to established companies, with a cohesive community of mentors, investors, thought leaders, and founders at the center of it all. The Virginia Bio+Tech Park is the anchor of our region's advanced-technology community and home to nearly 70 private and nonprofit companies, state and federal laboratories, and research institutes of VCU and VCU Health, employing approximately 2,400 researchers, scientists, engineers, and support personnel – including Altria's Center for Research and Technology, the largest private investment in the city. Lighthouse Labs, now in its fifth cohort, is a nationally-ranked regional accelerator that supports companies located in-and out-of-market.

Our region's colleges and universities support entrepreneurial programs and produce the skilled talent to fuel the startup community. From Scott's Addition and the Arts District to the Innovation District, anchored by the Virginia Bio+Tech Park and VCU, down to burgeoning Shockoe Bottom – you will find not only leading-edge research and a vibrant entrepreneurial ecosystem, but also the innovation teams for our major companies, including CarMax and Capital One's new innovation hub that will also be home to the Startup Virginia incubator.

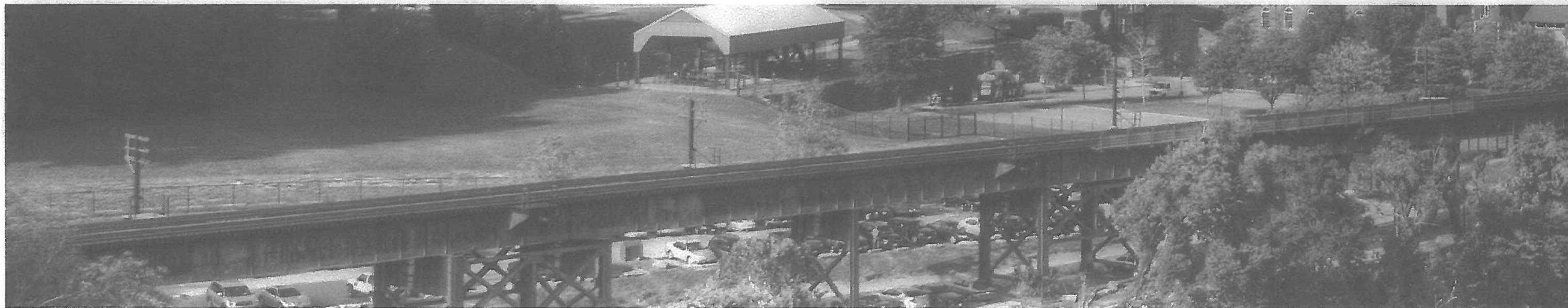
We are known as a perfect test market for products because of our diverse community, with WalletHub ranking the Greater Richmond MSA (among its peers) as No.12 on the "Communities that Most Resemble the U.S.A." and No.18 overall. This is nothing new—our legacy as a launch pad dates back over 100 years. For example, Fortune 500 Performance Food Group has roots here tracing back to 1885; in 1887, the first commercial electric street car system was launched; and in 1935, the first canned beer was sold by the Krueger Brewery of Newark, N.J. after test-marketing in Richmond. Currently, there is a grocery war converging in the Greater Richmond market with Lidl, Aldi, Kroger, Publix, Fresh Market, Wegman's, and Whole Foods all assembling in this microcosm of America.

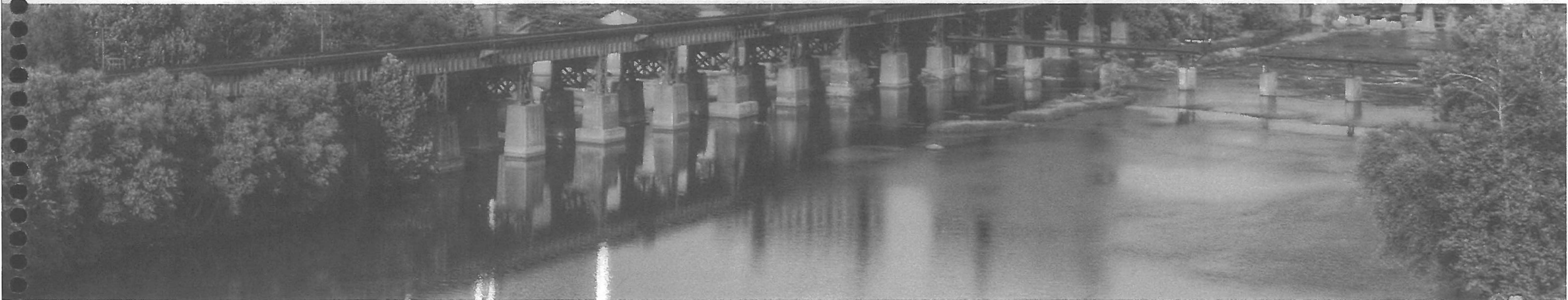
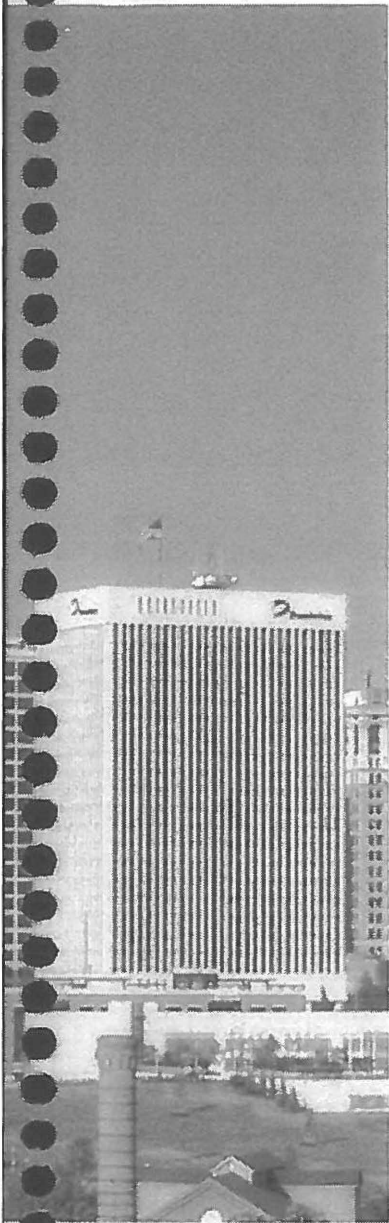
Along with Virginia, Greater Richmond is eager to partner with Amazon on growth initiatives that could include:

- Streamlining regulatory process for testing new technology and concepts (e.g., Amazon grocery stores, drone delivery)
- Partnering on innovation in public services (e.g., autonomous vehicles as part of public transit, crime prevention)

ROOM TO GROW...TOGETHER

As our region continues to grow, we would embrace a partner like Amazon with a shared vision of dynamic growth. Our City still has plenty of room to grow, with ~3,000+ developable acres in the city (out of a total area of ~40K); 5,100 total acres developable in the next 20 years; and only 1,800 to 3,500 acres of new land-use demand expected over that same period. In Henrico, there are 60,000 acres of developable land (42,000 vacant, 18,000 suitable for higher-density redevelopment). In Chesterfield, there are 38,528 acres of land that are vacant and zoned for development, with an additional 70,094 acres of vacant land suitable for future development. The induced demand that Amazon HQ2 can create will catalyze residential and commercial development to benefit both of us.







CONNECTIVITY

As Virginia's capital region, Greater Richmond's strong transportation infrastructure connects us to the Mid-Atlantic region, the U.S., and the world. Bold plans are in place to strengthen these assets, enabling increased accessibility and even faster travel times. Richmond and its surrounding areas are committed to further investing in multimodal public transit to support future growth and Amazon's specific needs.



DIGITAL INFRASTRUCTURE

Virginia has 48.2% fiber coverage, ranking seventh among the 50 states. Greater Richmond has ample, reliable, and high-speed digital infrastructure (~87% of Virginians have access to wired broadband of 100mbps or faster). High internet speeds are scheduled to further improve with two brand-new, cutting-edge trans Atlantic fiber cables connecting to existing dark fiber in the region and up through Northern Virginia's cluster of data centers. Greater Richmond's proximity to Amazon Web Services' East Coast Corporate Campus and major Amazon data centers across the state will allow Amazon HQ2 close and strategic access to key operations.

For multiple cellular phone coverage maps on all submitted sites, please see the Appendix available in the document download on RVA.AMZNHQ2.COM.

Greater Richmond's
cellular coverage
is some of the

best

in the country.

No. *1*

in call performance

No. *2*

best city for
cell phone service

No. *3*

in reliability



ROADS

Greater Richmond's central geographic location provides strong connectivity to the state and the nation.

Our extensive highway infrastructure of 18,700 lane miles, the largest in all Virginia districts, makes travel easy and accessible and provides connections across the Eastern Seaboard. Conveniently located at the center of the extensive Mid-Atlantic transportation network, 43% of the U.S. population is within a one-day drive (10 hours), and 55% of the U.S. population lies within a 750-mile radius.

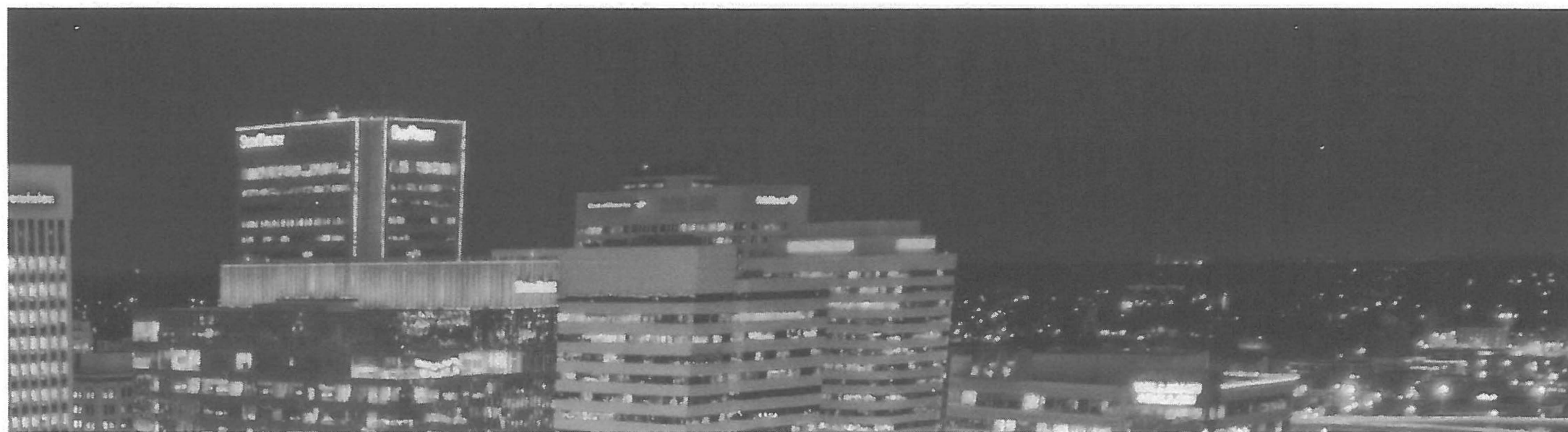
There are also concrete commitments to further improvements:

- Three major interstate highways – I-95, I-64, and I-85—flow through Richmond, with a \$75M per year state commitment to maintaining high-quality highways in the region
- FY18-23 Virginia Six-Year Improvement Program identifies ~\$970M in planned spending for transportation improvements in the Richmond District



“*First, logistics here are great. We can reach almost 50 to 60 percent of the country easily in less than two-days drive and the cost of living here is cheaper compared to other states.*”

ANDRE BETTIN,
DIRECTOR OF SALES, MAYALÉRIO



We're a two-hour drive from D.C., and within five hours of New York, Philadelphia, Pittsburgh, and Charlotte.



Niagara Bottling, LLC is committed to providing a high-quality product with unmatched quality service to its customers. The Chesterfield, Virginia location allows the company to fulfill that commitment by providing an optimal location that is close to both its existing and growing customer market.

BRIAN HESS,
EXECUTIVE VICE PRESIDENT, OPERATIONS, NIAGARA BOTTLING, LLC





AIR

Richmond International Airport (RIC) has access to key destinations for Amazon and the potential to expand even further. It has 17 routes to New York City and four daily shuttles to Washington, D.C. It has the capacity to expand its number of long-haul flight routes (current and ongoing plans to add six gates to the airport), and the state and local governments are financially committed to offering revenue protection to airlines opening new routes to major metropolitan areas (particularly SFO and SEA) in order to match Amazon's needs. Approximately four daily commercial air shuttles between RIC and Dulles International provide easy access to a variety of international locations. It is also conveniently located just 20 minutes away from Richmond's City center.

RIC is designated as Foreign Trade Zone (FTZ) 207, where foreign and domestic merchandise is considered in international commerce (not in U.S. Commerce territory). FTZs allow businesses to reduce the costs associated with production, transaction, and logistics. FTZ 207 operates under the Alternative Site Framework.





RAIL

Amtrak's four stations in the region provide a convenient and productive transit option for residents and employees. Main Street Station in downtown Richmond, Staples Mill Road Station in Henrico County, Ettrick Station in southern Chesterfield County, and Ashland Station in Hanover County provide access to locations across the state and the Eastern Seaboard. These stations provide the region with in-state connection to 21 stations, including Northern Virginia, Virginia Beach, and Charlottesville, and out-of-state train travel through the East Coast corridor, to the Midwest, as far north as Canada, and as far south as Miami.

High-speed rail is on the way and would further advance our regional connectivity. Improvement on the rail to Washington, D.C. would reduce travel time to ~2 hours, provide trips in each direction every ~45 minutes, support 15% improvement in reliability, and create 90% on-time performance.

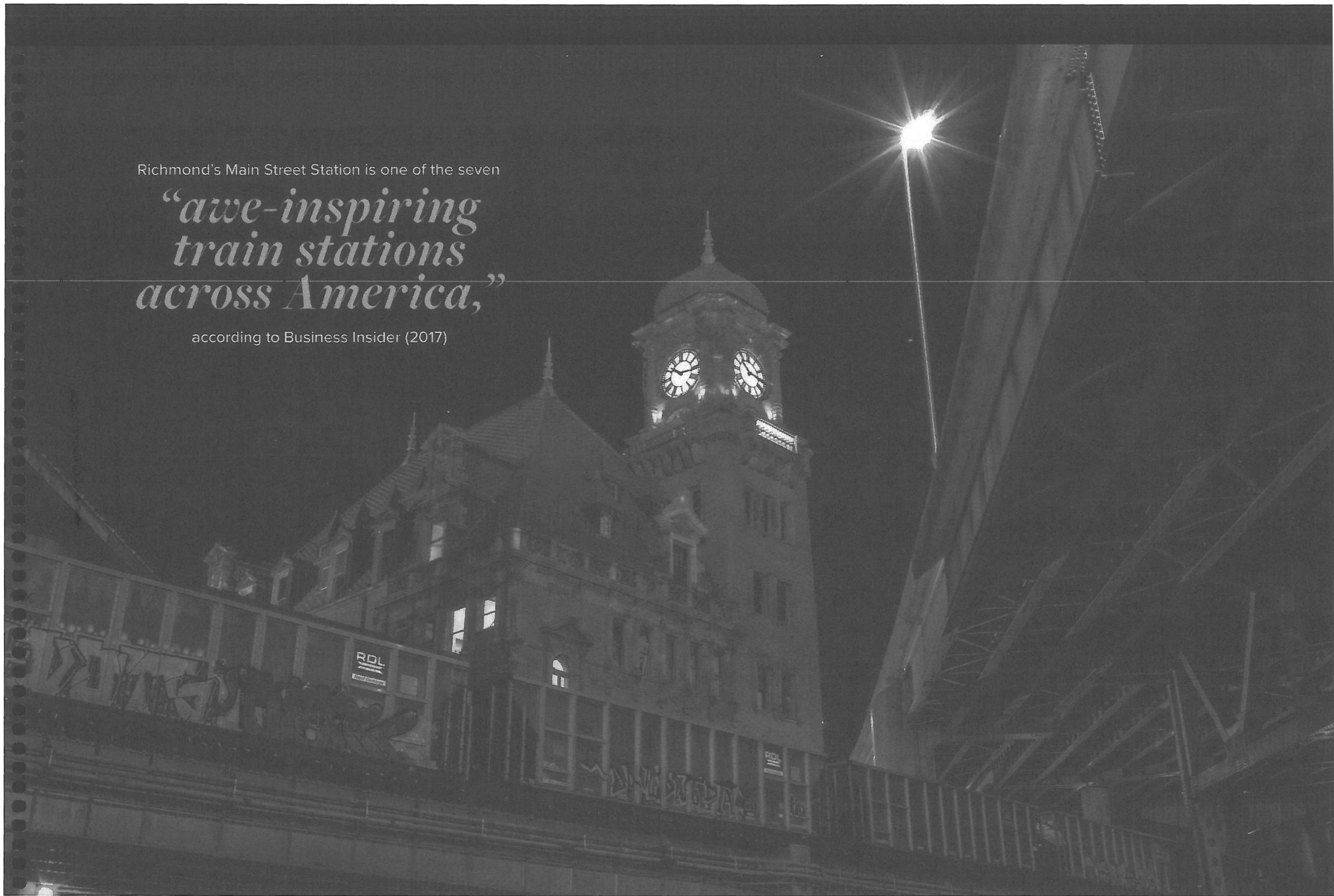
Improvements to the routes to Charlotte will increase service by 400%, reduce the trip time to five hours, and increase reliability to 90% on-time travel.



Richmond's Main Street Station is one of the seven

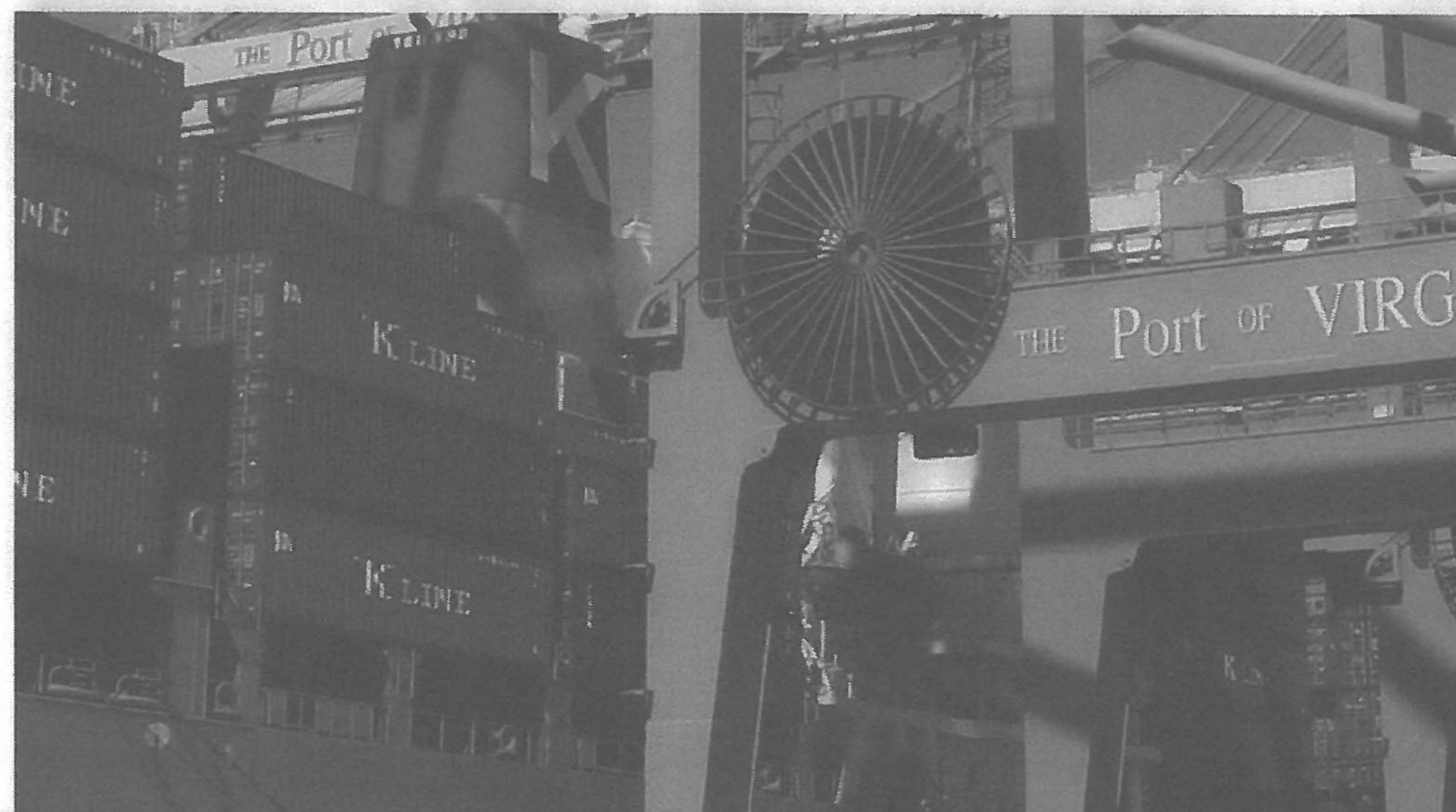
*“awe-inspiring
train stations
across America,”*

according to Business Insider (2017)



“*The Port of Virginia (POV) has been a catalyst for commerce for all of Virginia and has built inland facilities in Richmond and Northern Virginia. The POV's long-term thinking is improving connectivity, sustainability, economic development, and customer service throughout this Commonwealth. We welcome this opportunity to innovate and grow with Amazon.*”

JOHN REINHART
CEO AND EXECUTIVE DIRECTOR, VIRGINIA PORT AUTHORITY





SEA

The Richmond Marine Terminal (RMT) provides direct barge service to the Port of Virginia's deep-water ports in Hampton Roads. The Port of Virginia is the only East Coast port that can currently handle post-Panamax ships as first and last port of call. It is also the only U.S. East Coast port with Congressional authorization for 55-foot depth channels.

The RMT is also a U.S. Customs-designated port of entry, and the full range of customs functions is available to customers. The terminal has ample open storage and rail-serviced warehouse space available. CSX rail is onsite, with Norfolk Southern available via a local switch.




THE PORT OF VIRGINIA IS THE THIRD-LARGEST PORT ON THE EAST COAST
(IN CARGO VOLUME) AND ONE OF THE TOP FIVE PORTS IN NORTH AMERICA

ENSURING EASY LOCAL TRANSIT AND COMMUTES

The Richmond Metropolitan Area is ready to ensure we successfully accommodate growth with Amazon over time. Our two Metropolitan Planning Organizations (MPOs) have a demonstrated history of effectively working to solve future congestion. This is important for a region forecast to increase its population to almost 1.5M residents by 2040. Our long-range transportation plans for both MPOs identify \$3.2B over the next 20 years for transportation improvements that can be adapted to Amazon's future location. In addition, the region's project development and funding process is nimble enough to accelerate critical projects when opportunities arise, helping meet Amazon's needs through effective capacity analyses and cost estimations. We've already funded and accelerated regional priorities, including Pulse Bus Rapid Transit System, I-64 East major widening from I-295 to Bottoms Bridge, and are prepared to do more.

Greater Richmond has the lowest congestion rate of any large city in the U.S. (populations of 1-3M) with peak traffic congestion of only 16% and enough capacity to absorb Amazon's influx of commuters. Average commute time is only 25 minutes (vs. the 26.6 minute U.S. average), and the region has the lowest traffic delay and congestion-related cost data of any of the 46 very large and large urban areas in the U.S. Based on our population growth and traffic projections, a 50,000-employees increase can already be accommodated region-wide through existing transportation infrastructure and planned transportation investments.





The Richmond Regional Transportation Planning Organization and its members are investing \$23M in bicycle and pedestrian facilities over the next six years, and another \$110M to the year 2040. For example, the Pulse Corridor Plan identified as a high priority the construction of a pedestrian/cyclist bridge linking the Science Museum to Broad Street by turning existing Science Museum rails into trails. Once south of the CSX railroad tracks, this trail will travel west and wrap around Scott's Addition.

Richmond is highly accessible by bike, offering more than 80 miles of bikeways in the region and an active bike share program, with a commitment to include a bike share station adjacent to HQ2.

SMART MOBILITY

Greater Richmond has also been a leader in innovative, smart mobility solutions. The city is poised to make big strides in the next few years, with ongoing implementation of a smart signal system, plans for E911 and Transit interactivity, and a total replacement value of \$160M. We have also launched Smart City Works Infrastructure Actuator, a business accelerator implementing innovative technologies.

Recent achievements include an effective traffic management system conducted by the district's Traffic Operations Centers (TOC) that uses the latest in Intelligent Transportation System (ITS) technology to enhance traffic flow and safety along the region's roadways. The TOCs operate the Advanced Traffic Management Systems (ATMS), which gather data from the various ITS devices, enable the TOCs to detect traffic incidences and congestion rapidly, and dispatch resources to the incident scene and smooth the flow of traffic.





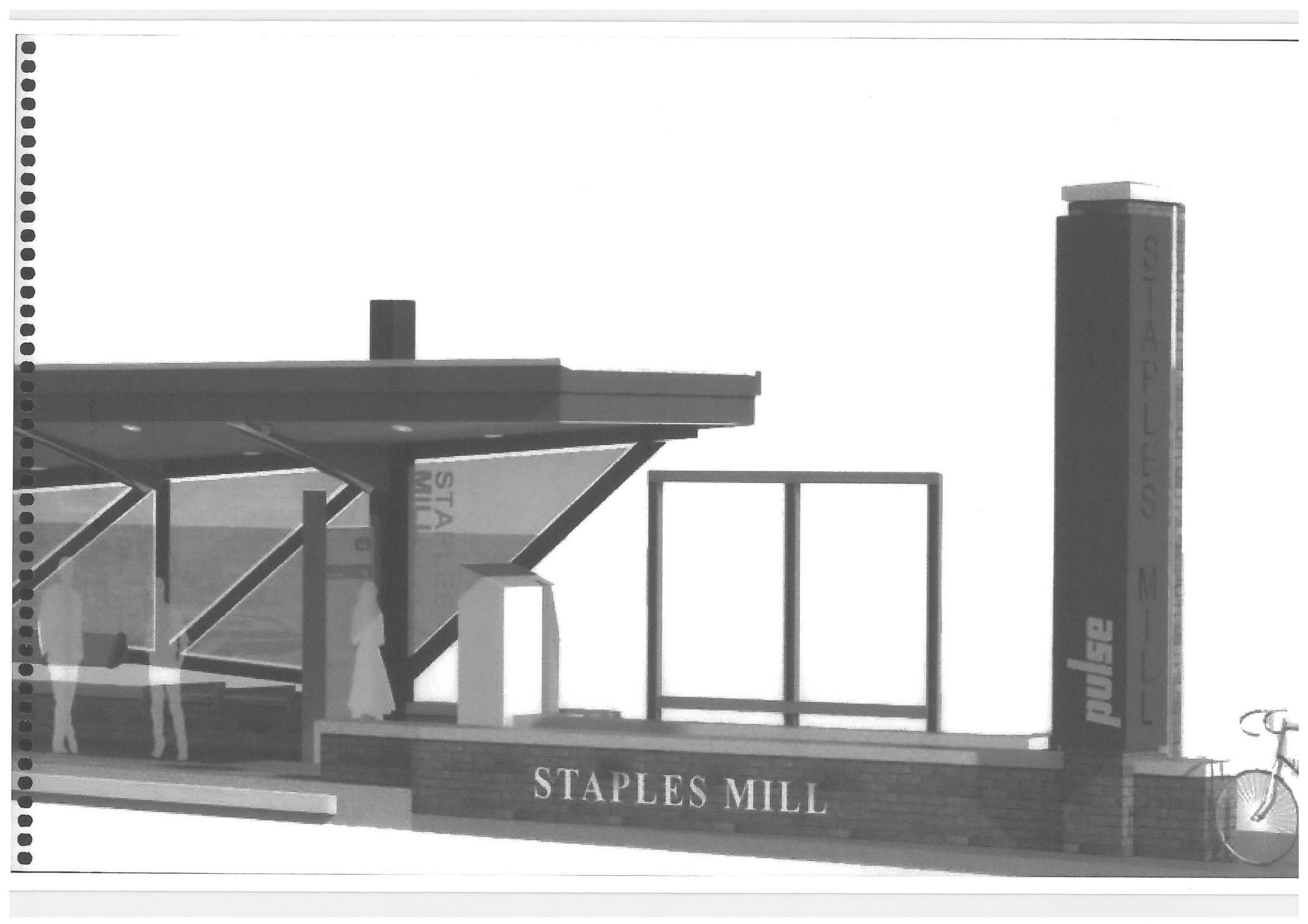
OUR TRANSIT VISION

While Greater Richmond already has an extensive public transit system, the region is committed to improving commuting options for Amazonians by embracing cutting-edge transportation initiatives.

“Our vision is to connect the Richmond region through an efficient, reliable, seamless, and sustainably funded system that benefits everyone by enabling economic growth, promoting livable and walkable transit-oriented development, expanding access to jobs and services, and strengthening multimodal access within and beyond our region.”

GREATER RICHMOND TRANSIT VISION PLAN





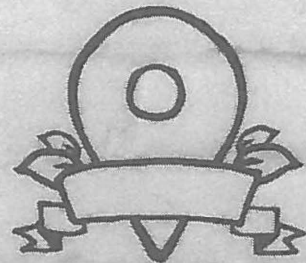
A significant expansion of current commuting options is proposed to increase population and jobs near transit lines by ~75% while quadrupling population access to high-speed transit, including:

- **Five Bus Rapid Transit (BRT) Pulse Lines** that offer premium, high-capacity, rapid bus service over an 80-mile long network. With the first route of the system expected to open in the coming months, it will provide expedited (every 10-15 minutes) service through infrequent stops (every 0.5-1.5 mile). A BRT loop around the HQ2 site will be considered as part of the plan
- **Twelve high-frequency bus routes and four enhanced local service bus routes** that provide greater access and reliable service on key regional corridors where the opportunity for enhanced access to employment and activities requires all-day service, complemented by 10 lower frequency routes
- **Six express/regional bus routes** that provide long-distance regional connections via the region's high-speed facilities
- **First mile/last mile coverage** through free demand response shuttle service electric vehicles and expansion of ride sharing, ride hailing programs
- **Transit signal priority** along all major transit routes



We would further experiment with innovative commuting modalities, including:

- Vanpool ridesharing and a smaller carpool commuter program through RideFinders, a regional transportation demand management provider that offers information, assistance, and incentives to employers and commuters on vanpools, carpool matching, teleworking, and bike and transit commuting. It also offers an emergency ride home program
- Deviated Fixed Route services (calling ahead of time so each day's routes adapt to pick up at requested locations) to offer flexibility to reach more dispersed riders
- Potential for testing autonomous vehicles across the public transit system



PROPERTIES

Creating a space for Amazonians to be at their best at work and at home is a priority for us. That is why we have selected sites that offer unique advantages but have one thing in common: access to the best of Greater Richmond. Regardless of which site you choose, you will find caring communities and leadership who is committed to partnering with Amazon to grow together. With instant access to the heart of downtown Richmond or the banks of the James River, employees living and working at HQ2 will find themselves continually inspired by their surroundings.









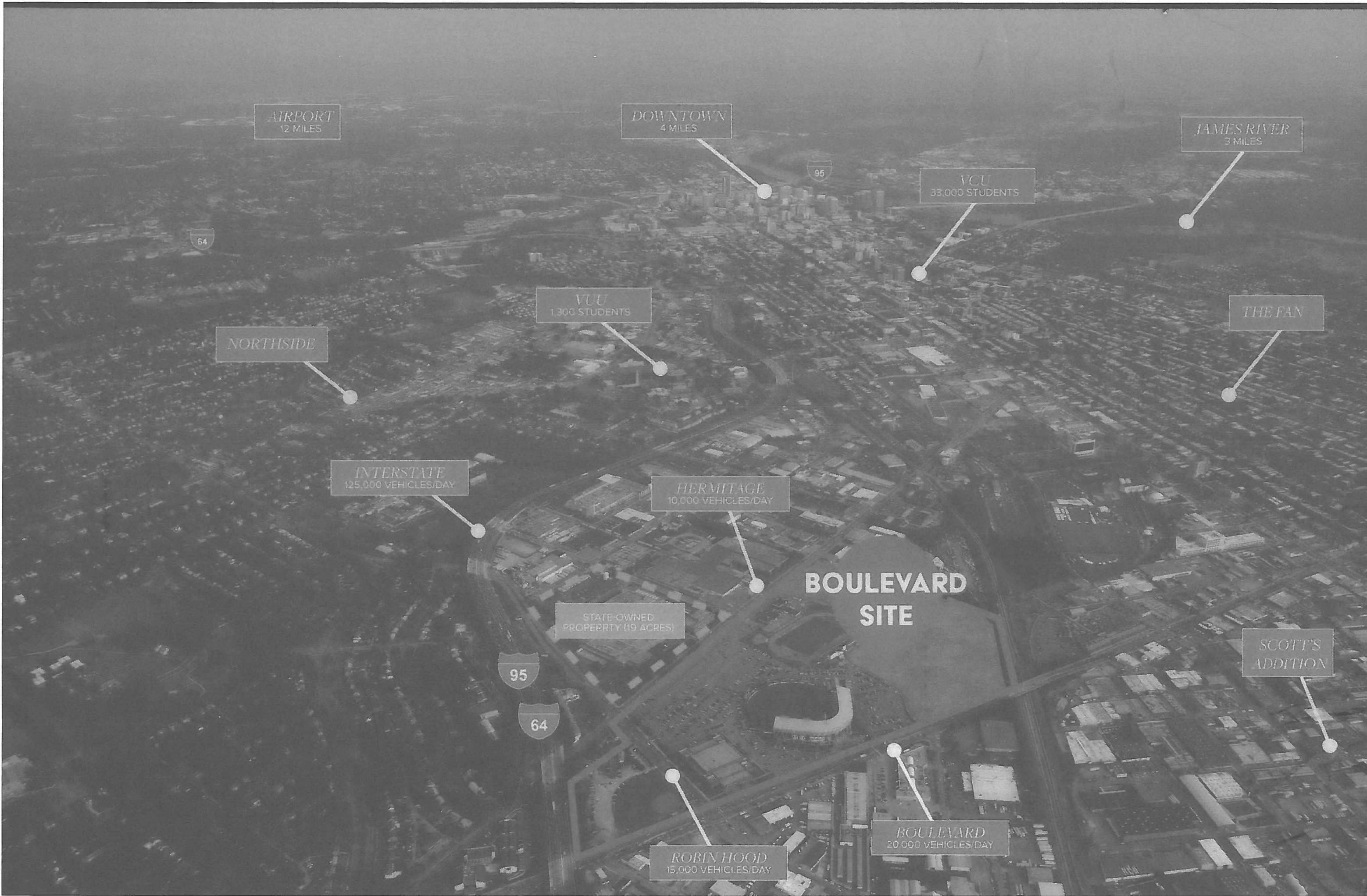


The Boulevard

UNABASHEDLY URBAN

Amazon at the Boulevard will be part of a much larger re-imagining of the City of Richmond. Building on the recently adopted Pulse Corridor Plan and our city-wide Master Plan, which is underway, Amazon's campus development will catalyze a redevelopment scheme that will not only support its investment but provide opportunities for true transformation. Richmond is NOT afraid to grow and embraces the opportunity to grow with Amazon in its future.





AIRPORT
12 MILES

DOWNTOWN
4 MILES

JAMES RIVER
3 MILES

VCU
33,000 STUDENTS

VUU
1,300 STUDENTS

NORTHSIDE

THE FAN

INTERSTATE
125,000 VEHICLES/DAY

HERMITAGE
10,000 VEHICLES/DAY

BOULEVARD
SITE

STATE OWNED
PROPERTY (19 ACRES)

SCOTT'S
ADDITION

BOULEVARD
20,000 VEHICLES/DAY

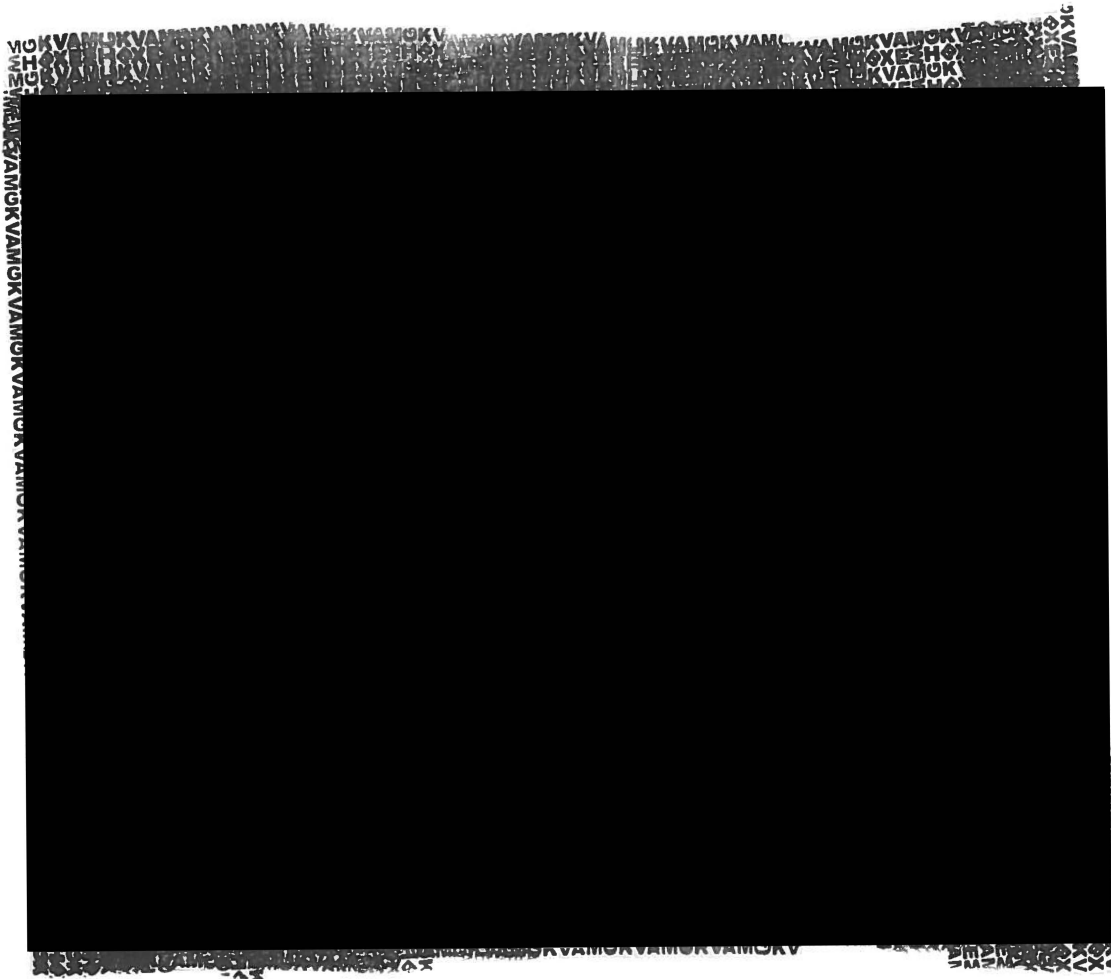
ROBIN HOOD
15,000 VEHICLES/DAY

SITE OVERVIEW

The Boulevard Site is owned and controlled by the City of Richmond and the Commonwealth of Virginia. The City has been preparing for a redevelopment of this strategic site for a number of years and in the process has relocated city functions, demolished buildings, and remediated the site. Amazon's HQ2 is the ideal use for the redevelopment of the Boulevard property.

The Boulevard exit off I-95/I-64 is a major gateway into the City. Market conditions indicate a tremendous opportunity to revitalize an underutilized area of the City with private mixed-use development that, in addition to Amazon's HQ2 Campus, could naturally include residential, retail, and entertainment concepts.

While there are currently existing buildings on the proposed site, these are not impediments, and they can all be moved or leveraged as opportunities to incorporate amenities into the campus environment.



the **BOULEVARD**
UNABASHEDLY URBAN

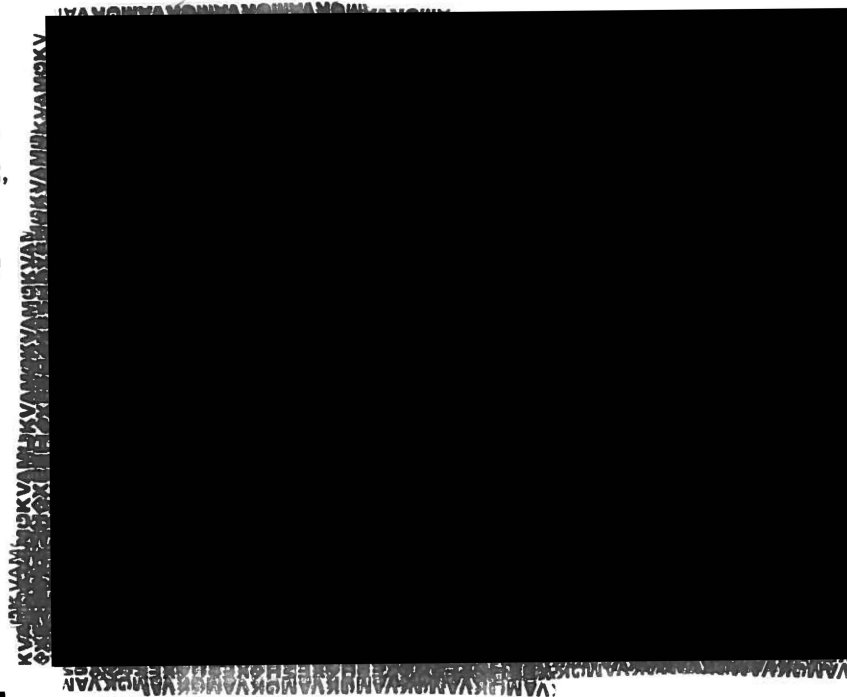
ROOM TO GROW

Think of the Boulevard area as a canvas awaiting an imaginative and vibrant plan for the future.

As part of the planned redevelopment strategy, the City will rezone the property in a manner that allows for highly dense, mixed-use urban development. With our TOD-1 or B-4 zoning, for example, the entire Amazon campus could fit on the 65-acre Boulevard site with building heights accommodating such density.

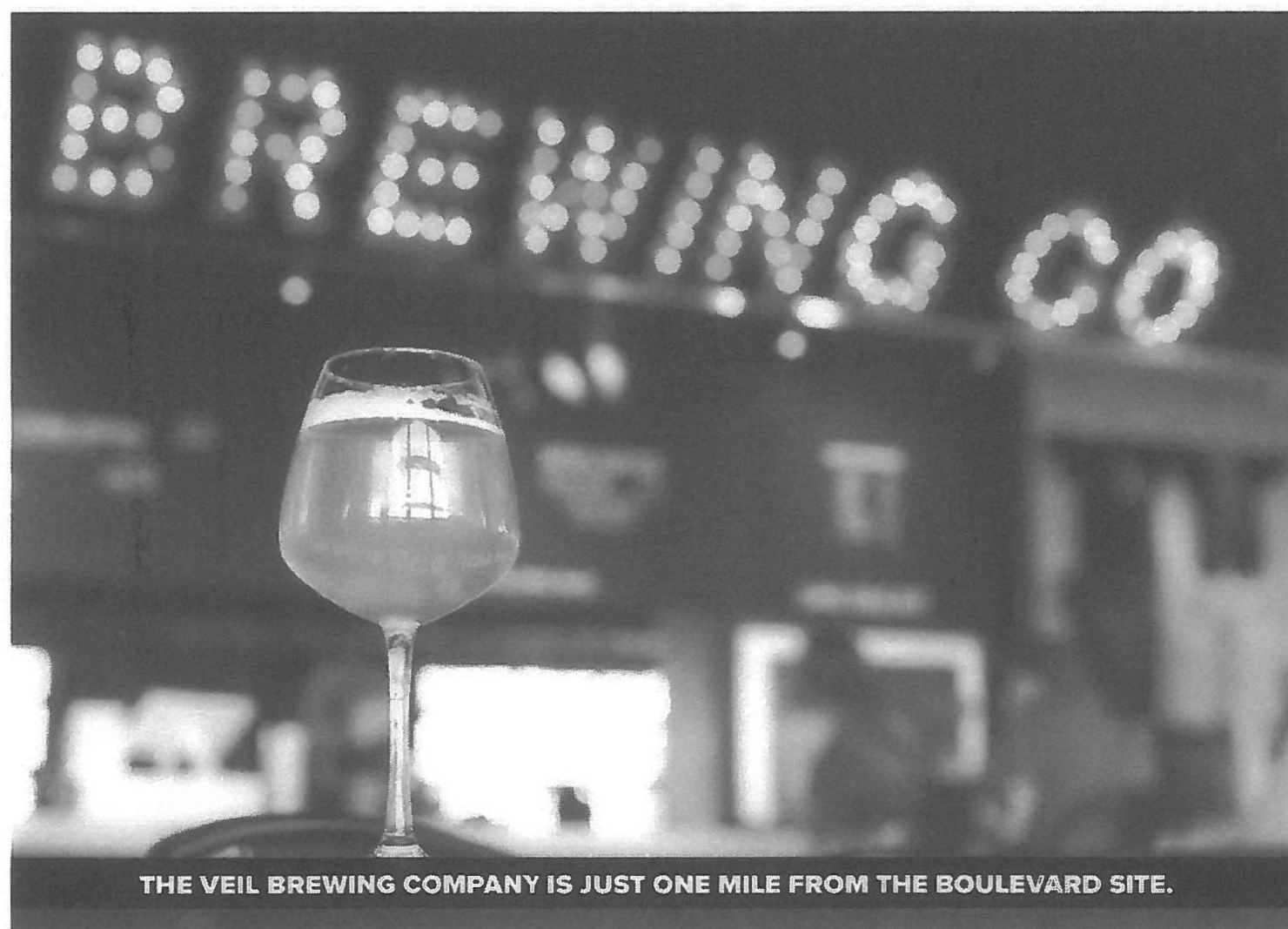
The Boulevard site is further enhanced by neighboring properties owned by the Commonwealth of Virginia and private owners. These properties could serve as expansion areas for future phases of the Amazon campus. It is envisioned that additional capacity can be accommodated on the state-owned 19-acre +/- site across Hermitage Road, where the Virginia ABC operations and distribution center is currently housed

The development of the multi-purpose venue will coincide with Amazon's development schedule and can be integral to an even larger development concept.









URBAN FUSION

The Boulevard is complemented by the surrounding neighborhood, Scott's Addition, which has undergone organic transformation over the last decade. It has become a makers' hub, a thriving residential community, and a popular entertainment area for a diverse community. Craft breweries, distilleries, cideries, restaurants, architects, techies, artisans, and coffee shops are locating here and creating a village-like environment. Scott's Addition is likely to be one of many neighborhoods where Amazon employees live, dine, and create. As shown in the Existing Land Use Map, the Boulevard Site is nestled between a multitude of neighborhoods.

The City's transportation grid system makes connectivity easy and convenient. If one street is experiencing temporary congestion, there are always multiple other ways of traversing the City to get to your destination. This ease of connectivity suggests that Amazon's growth is not limited to just one site. In fact, we can envision Amazon or its many ancillary activities occurring organically throughout the City. The Boulevard site is under four miles from the downtown CBD and its many additional venues including:

The State Capitol: Where the seat of state government resides

City Hall: Where services are provided to Richmond residents

The Virginia Biotech Park: Where the Gates Foundation has granted \$50 million for research

Main Street Train Station: The future location for the high speed rail along the eastern seaboard

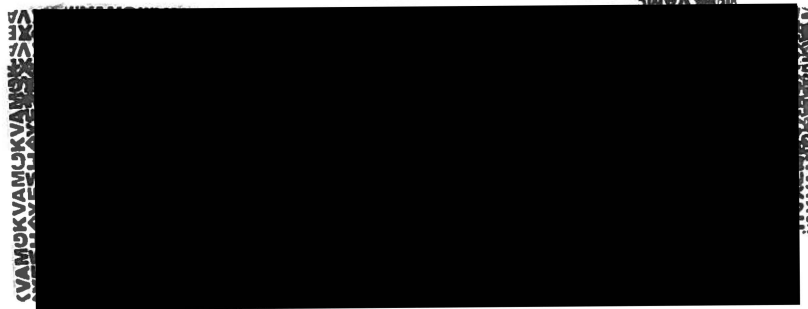
Shockoe Bottom: Where entrepreneurship and innovation is thriving

Brown's Island: A natural wonderland for outdoor enthusiasts

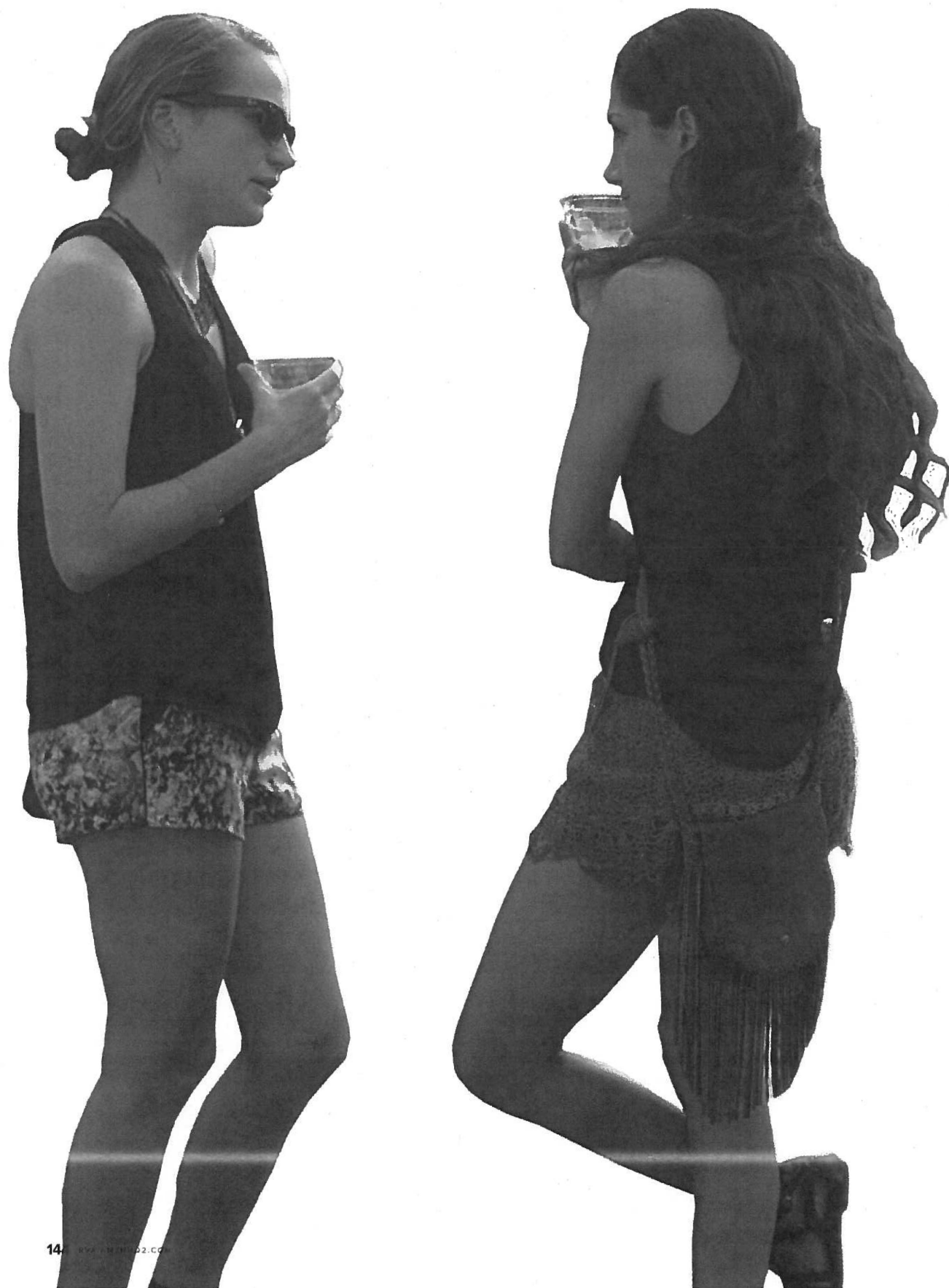
The James River: The region's most popular tourist draw and known for its class IV/ rapids

Phase I Vision

- To take advantage of its close proximity to Scott's Addition, Broad Street and dense neighborhood amenities already developed near the south section of the property, it is recommended that Phase I be built at the location shown in the **Phase I Rendering**.



the **BOULEVARD**
UNABASHEDLY URBAN



Phase II Vision

- This phase vision is fluid and depends on the needs of the company. See the **Phase II Rendering** for site design concepts.
- Building construction would range from 10 to 15 stories, with the height of the buildings stepping up towards the center of the campus.




Zoning

The current zoning designation within the Project Site is M-1 (Light Industrial). With its long-planned redevelopment strategy, the City has anticipated rezoning the property in a manner that allows for highly-dense, mixed-use urban development. There are several existing zoning districts that could be appropriate, including the City's TOD-1 and B-4. The City recently rezoned property adjacent to the Boulevard site to a TOD-1 District. These zoning classifications would allow the density and building heights needed to maximize the utilization of the site.

- The **TOD-1** district encourages dense, walkable, transit-oriented development (up to 12 stories) to promote enhancement of the character of this development along principal corridors, at key gateways, and at nodes of high activity located near transit service, bicycle infrastructure, and pedestrian-friendly streetscapes.
- The **B-4** district is a mid-to high-scale, mixed-use zoning district that is currently only found in Richmond's central business district. It permits a wide range of business, office, retail, service, and multi-family residential uses. Heights are dictated by an inclined plane originating in the centerline of the principal street of a parcel and can reach over 24 stories.

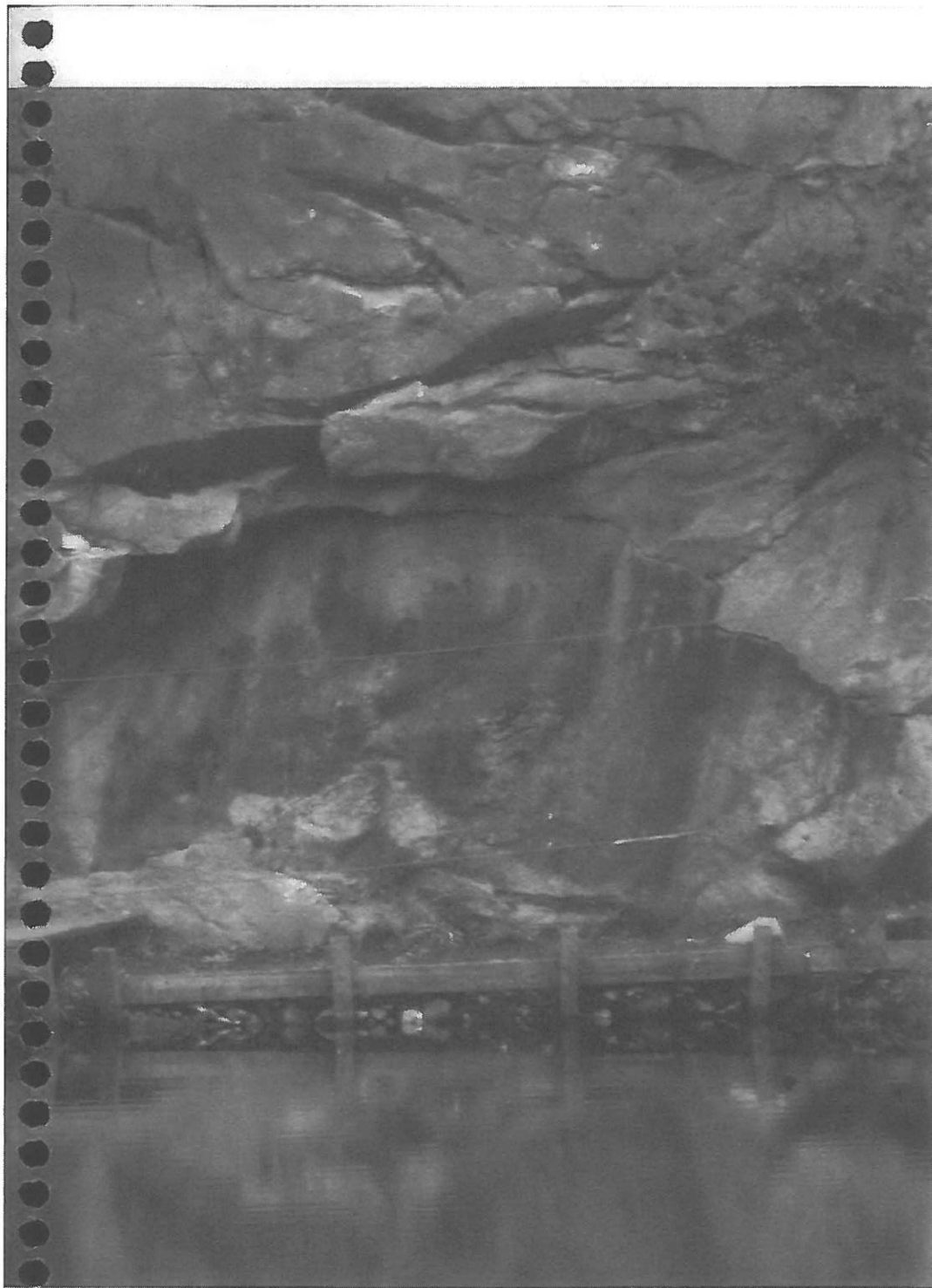
CAMPUS DEVELOPMENT OPPORTUNITIES

All parcels within the 67.57-acre footprint are owned by the City of Richmond and VCU. See the included map for the full parcel ownership configuration. An additional 19 +/- acres of land owned by the Commonwealth of Virginia could be available as part of this project, as shown in the aerial maps of the Boulevard Site and its environs.





THIS CLIMBING WALL ON BELLE ISLE IS ONLY THREE MILES FROM THE BOULEVARD SITE.



UTILITY INFRASTRUCTURE

Existing Natural Gas Utility

The City of Richmond owns and operates the eighth largest municipality-owned natural gas utility in the United States. It is served by three major interstate pipelines owned by Columbia, Columbia Gulf Transmission, and Dominion Transmission, Inc. There is ample gas service in the vicinity of the project area to serve the proposed redevelopment density.

Public gas infrastructure needed to support the proposed densities is expected to be 6"-12" lines with associated appurtenances, looped throughout the site, located within the roadway infrastructure. Individual service lines would then tap into the surrounding public infrastructure.

Existing Water Infrastructure

The City of Richmond is a regional supplier of water, owning and operating the second largest water treatment plant in the Commonwealth. The City has the capacity to produce 132 million gallons of water per day. The City's long-term water treatment plan shows that Richmond has both the water supply and treatment capability to meet the projected growth demands of the City and region well into the 2030's.

Existing water infrastructure and service are ample in the vicinity of the site area to serve the proposed project with sufficient water pressure to support the redevelopment densities proposed. However, a detailed model of the water distribution system would be needed to confirm water pressures and available fire flows at specific building locations.

Proposed public waterline infrastructure needed to support the proposed development densities is expected to be 8"-16" lines with associated appurtenances, looped throughout the site, located within the roadway infrastructure. Individual service lines would then tap into the surrounding public infrastructure.



THE PIPELINE WALK IS A HIDDEN GEM IN THE JAMES RIVER TRAIL SYSTEM.



UTILITY INFRASTRUCTURE

Existing Sewer Infrastructure

The City's sewer system is part of the Combined Sewer System (CSS), where the sanitary sewer and storm drainage are combined into one sewer system.

No new combined sewers are allowed within the City's system, which means that separate sanitary sewer and storm sewer will need to be installed within the development footprint, connecting the existing large combined sewers in North Boulevard, Hermitage Road, Robin Hood Road and Sherwood Avenue. Public sanitary sewer infrastructure needed to support the proposed densities is expected to be 8"-12" lines with associated appurtenances, looped throughout the site, located within the roadway infrastructure. Individual service lateral lines would then tap into the surrounding public infrastructure.

Drainage/Stormwater Management

As mentioned, the drainage infrastructure in the project area is part of the City's CSS. There is no FEMA Floodplain located within the project area, so there are no redevelopment restrictions based on floodplain limits. There are also no Chesapeake Bay Preservation Areas (CBPAs) (sometimes referred to as Resource Protection Areas (RPAs) or Resource Management Areas (RMAs) located within the project area. Since the project area is in the City's CSS and there are no CBPA areas within the project area, there are no required water quality best management practices (BMPs) required for redevelopment. This is a significant advantage for redevelopment of this area.

The only stormwater management requirement for the project area is that the post redevelopment stormwater runoff must not exceed the existing stormwater runoff. Given that the project area is already vastly impervious (pavement and rooftops), it is likely that the percent of impervious will either remain the same, or perhaps be slightly reduced during redevelopment.

Although it is anticipated that limited stormwater detention infrastructure will be required, storm sewers will still be needed to convey water from rooftops and roadways to the downstream system. Proposed public sewer infrastructure needed to support the proposed densities is expected to be 15"-48" lines with associated appurtenances, located within the roadway infrastructure.

the **BOULEVARD**
UNABASHEDLY URBAN



DOWNTOWN RICHMOND



UTILITY INFRASTRUCTURE

Existing Private Power Infrastructure

The vast majority of Dominion Energy infrastructure is overhead, but there are some isolated areas that are primarily underground. This electric infrastructure along road corridors can stay in place if these roadways are maintained during redevelopment, or easements could be granted if the roadways are re-routed or abandoned.

It is also likely that the developer would prefer to place the existing overhead power lines underground as a way to clean-up the aesthetic of the streetscape within the limits of the proposed redevelopment. While this is feasible, it adds expense to the project.

Existing Street Light Infrastructure

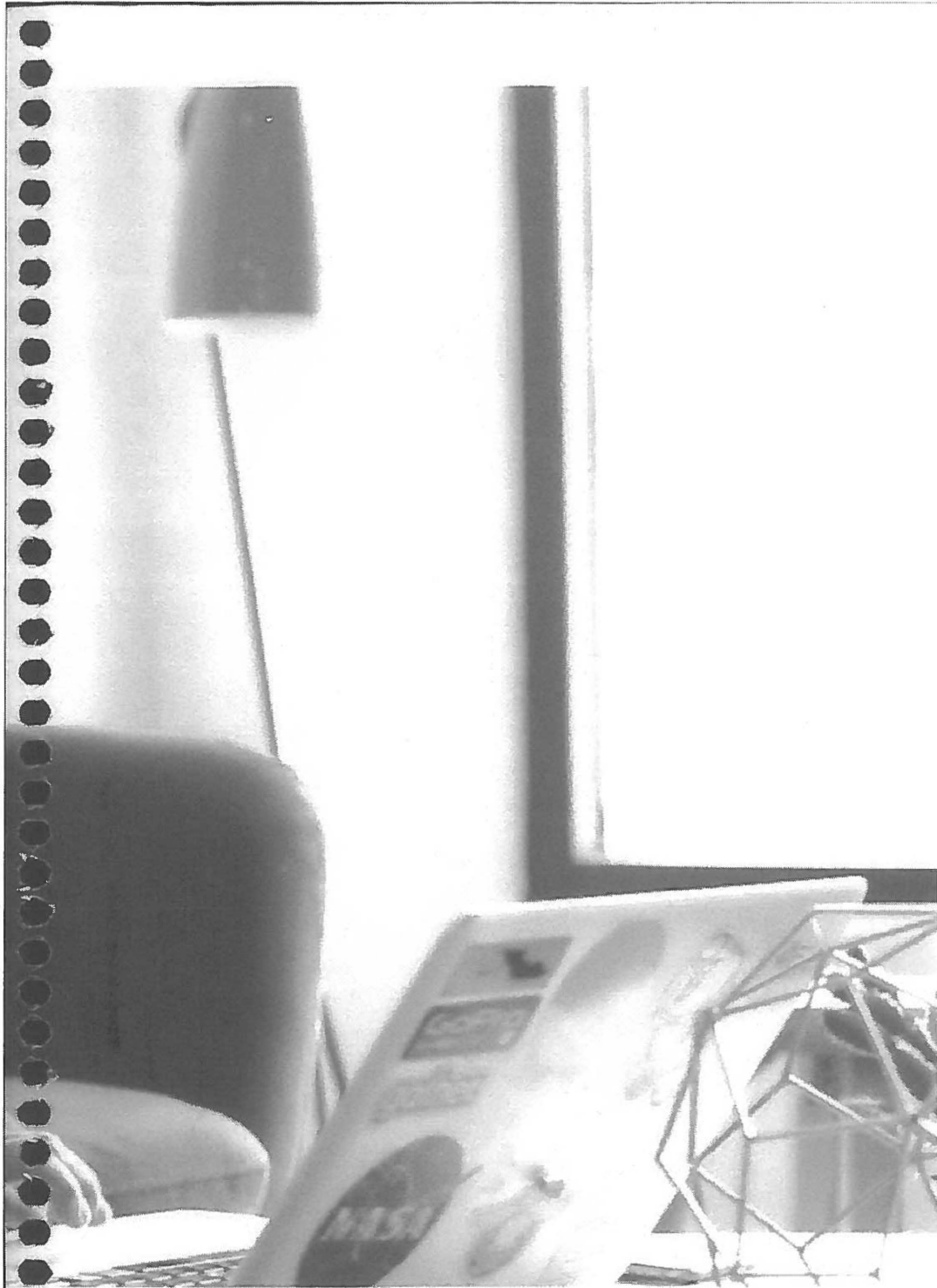
There are City street lights and City electric lines along all of the roadways within and adjacent to the project area. This City power grid serves City street lights and traffic signals, and is independent of the Dominion Energy grid that serves the buildings in the same area. This street light infrastructure along the road corridors can remain in place if these roadways are maintained during redevelopment, or easements could be granted if the roadways are rerouted or abandoned.



the **BOULEVARD**
UNABASHEDLY URBAN



GATHER, A CO-WORKING SPACE IN SCOTT'S ADDITION, IS HOME TO OVER 70 COMPANIES



UTILITY INFRASTRUCTURE

Existing Private Communications Infrastructure

Many of the shared poles for Dominion Energy and the City's electric system also carry Verizon and Comcast communications infrastructure along all of the roadways within and adjacent to the project area. This communications infrastructure directly services the buildings in the area.

Fiber

The Request for Proposal for the Amazon HQ2 project specifically asks about access to fiber optic communications lines. The City of Richmond is currently served with dark fiber from SummitIG and other providers. Dark fiber is existing installed fiber optic lines that have currently available, unused capacity. The dark fiber lines in Richmond have direct connection to the extensive data center network in Northern Virginia through fiber optic lines running along the Interstate 95 corridor. It is a simple connection to tie the Boulevard site into this existing dark fiber network in the immediate vicinity of the site. All four major cell phone providers have excellent coverage.

Other Property Details

- Almost all of the site is level at street grade and has minimal to no topographical challenges.
- No wetlands.
- Non-Special Flood Hazard Area (NSFHA) of minimal flood hazard usually depicted on Flood Insurance Rate Maps (FIRM) as above the 500-year flood level.
- The site has a low-to-moderate risk of seismic activity.
- The City has completed a Phase I and Phase II environmental assessment of those parcels at the south end of the Project Site. The City has entered into the State's Voluntary Remediation Program with the Department of Environmental Quality (DEQ) for a portion of this area.

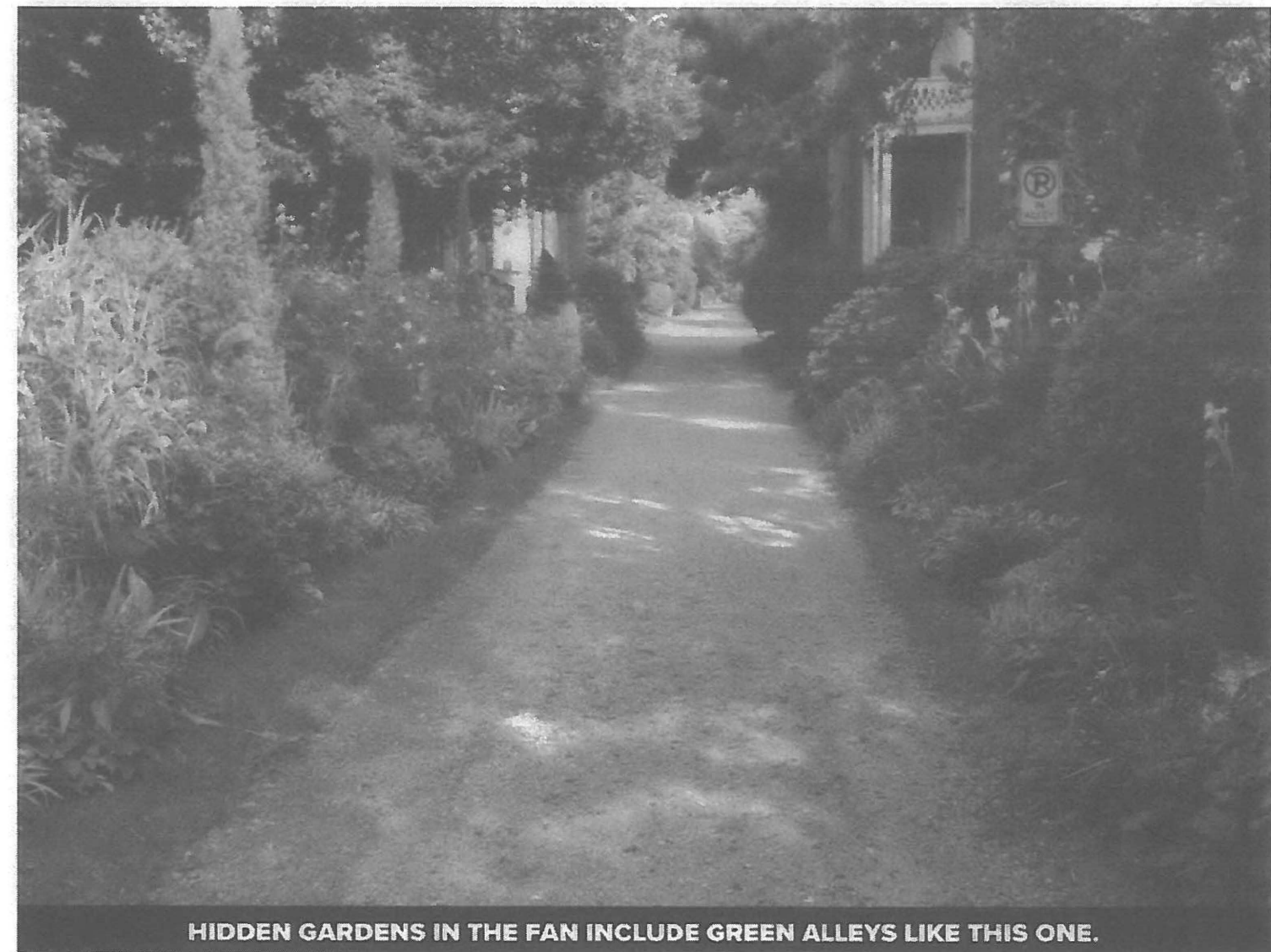
SUSTAINABILITY

RVAGREEN SUSTAINABILITY INITIATIVE

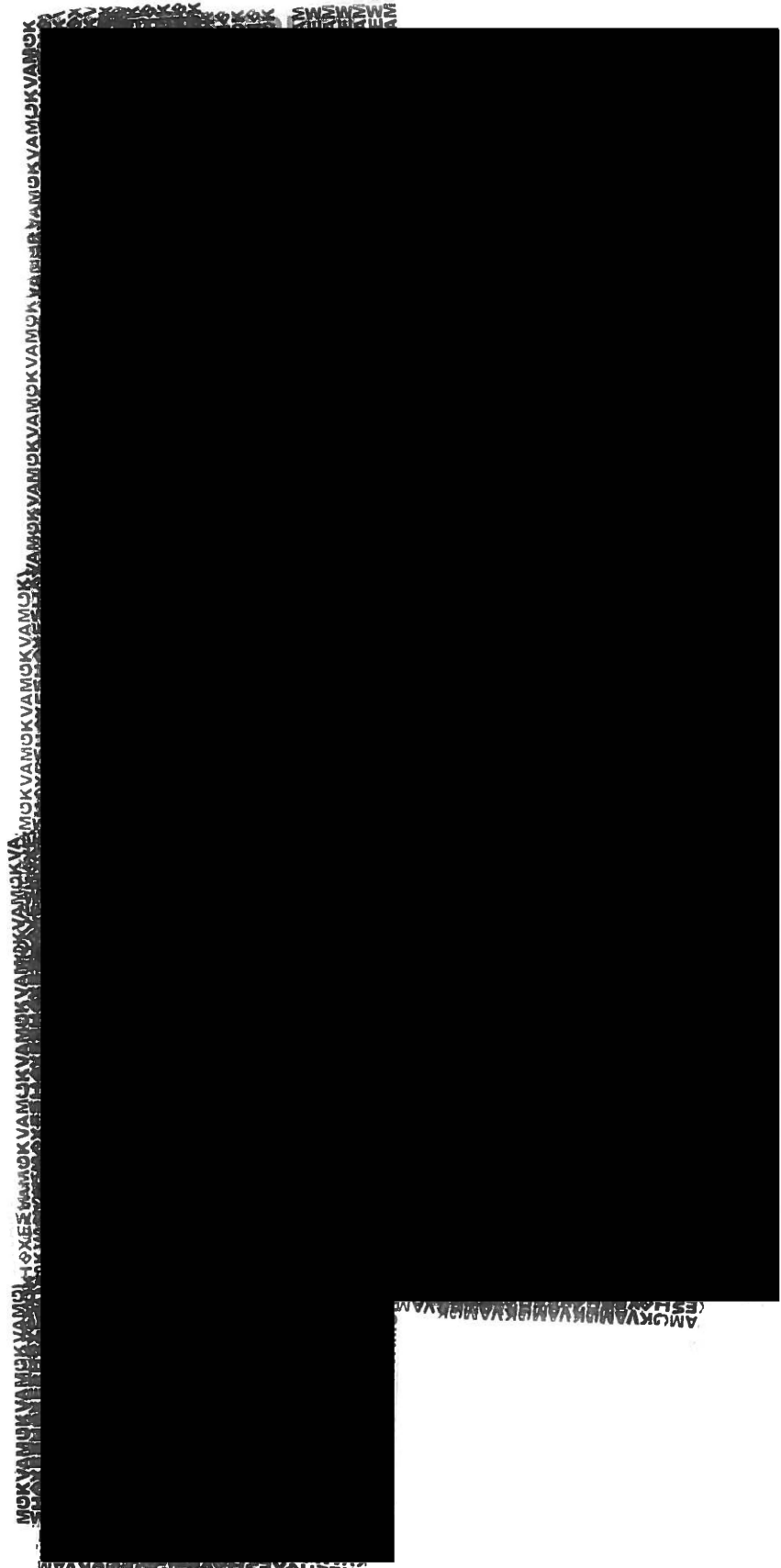
The City of Richmond is the only locality in central Virginia with a dedicated Sustainability Manager and sustainability initiative. RVAgreen, the city's sustainability initiative started in 2007, has reduced community GHG emissions by 15% and city government GHG emissions by 11% to date. Presently, Richmond is undertaking RVAgreen 2050, a planning process to develop a roadmap to meet Mayor Stoney's commitment to reduce community-wide GHG emissions 80% by 2050.

LEED CERTIFICATION

In 2008, the City passed an ordinance requiring all new construction and major renovation over 10,000 SF to be LEED Silver. Richmond now has 76 LEED-certified buildings, 11 of which are owned by the City and three that are LEED Platinum.



HIDDEN GARDENS IN THE FAN INCLUDE GREEN ALLEYS LIKE THIS ONE.





DOMINION ENERGY SUPPORT AND COMMITMENT

Headquartered in the City of Richmond, Dominion Energy benefits from a very positive and supportive relationship with the City. Dominion Energy has pledged to support this project and the City of Richmond on sustainability initiatives it implements.

Dominion Energy has a proven record of clean energy partnerships in Virginia

Dominion Energy is the national leader in forging innovative customer partnerships to deploy clean energy. Success stories to date include the following unique partnerships ranging from public schools to technology leaders:

- Approximately 260 MW of solar energy projects throughout Dominion Energy service territory deployed on behalf of Amazon Web Services, all of which have been accomplished through partnerships rather than the regulated context.
- A groundbreaking solar procurement agreement between the McAuliffe Administration and Dominion Energy to meet the Commonwealth's solar procurement goal of 15%.

Dominion has suggested other ideas for creating Smart Communities based on a smart and sustainable platform.

Intelligent Connectivity Hubs: The smart street light hub co-locates cameras, microphones, and other sensors to provide situational intelligence solutions such as parking availability, traffic congestion reduction, smarter travel recommendations, weather monitoring, environmental sensing, emergency response, smart energy efficient lighting, and more.

Robotics Ready Communities: Dominion Energy seeks to apply robotics to opportunities in unmanned aerial vehicles (UAVs or drones), robotic intelligent supply chains, and autonomous vehicles.

Community Microgrid: The City of Richmond, in concert with Dominion Energy and other technology providers, endeavors to establish a microgrid across a defined geographic district within the city. The microgrid, potentially comprised of renewable energy generation, fuel cells, microturbines, and energy storage, could supply sustainability, resiliency, and safety to multiple City blocks.



the **BOULEVARD**
SUSTAINABILITY

CONNECTIVITY

TRANSPORTATION NETWORK AT SITE

This site is strategically located at the center of the Richmond region and the crossroads of Interstates 64 and 95. In addition, interstates 85, 195, and 295 converge in the metro area.

AUTO

Traffic is served by a limited access interstate (I-95/64 Overlap) immediately adjacent to this site.

This interstate system (particularly between Exit 74 and Exit 79) experiences mild peak hour congestion in both directions in the morning and evening peak hours (Monday – Friday).

The improvements to the site's accessibility by car would significantly reduce commute times across the region. Please see the maps below for driving commute times in 2012 compared to estimate driving commute times in the future after all improvements have been completed.

BICYCLE TRANSPORTATION

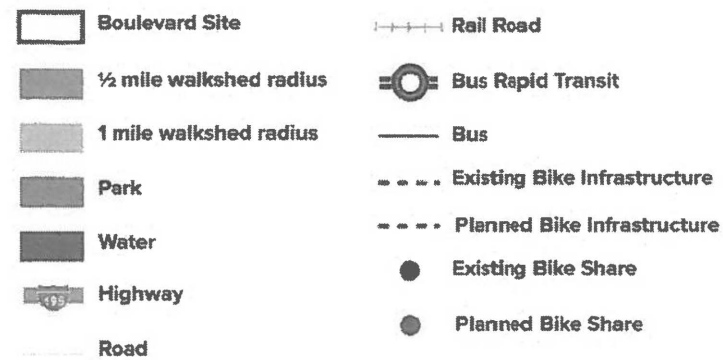
The City of Richmond Bicycle Master Plan was adopted in 2014. Currently, N. Boulevard running north-west, and E. Leigh Street, running east-west, are designated as shared lane road for bicycles.

RVA Bikeshare Program Kicked Off in August 2017

The RVA Bikeshare program kicked off in August 2017, with over 1,000 bikes being rented during the first weeks of operation. The first deployment includes:

- 220 bikes and 20 stations, focusing on downtown and nearby areas, including Scott's Addition and nearby BRT stations.
- Second deployment will include 220 electric pedal-assist bikes and double the system size to 440 bikes and 40+ stations.
- Stations will be located on Boulevard site as needed.

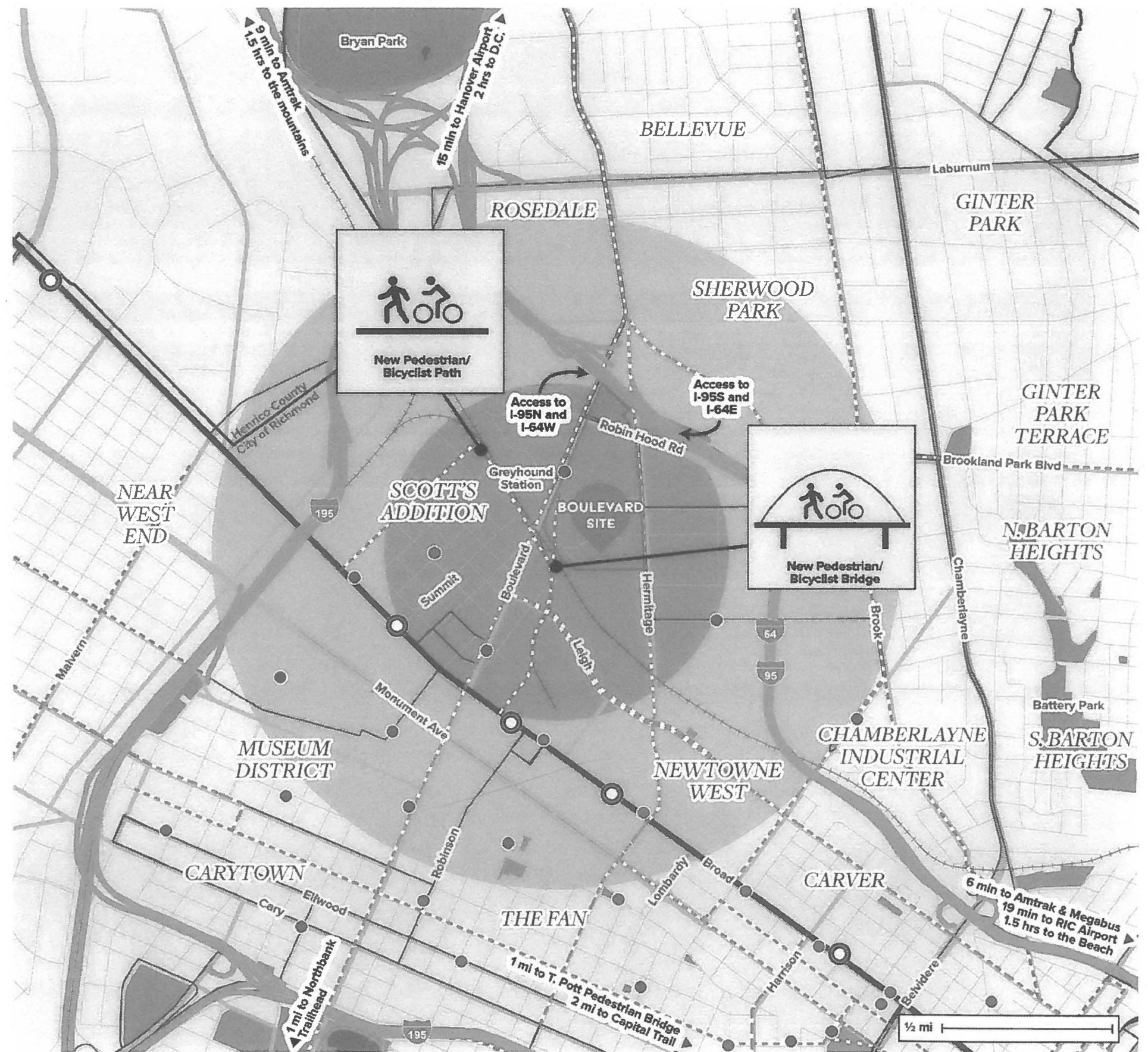
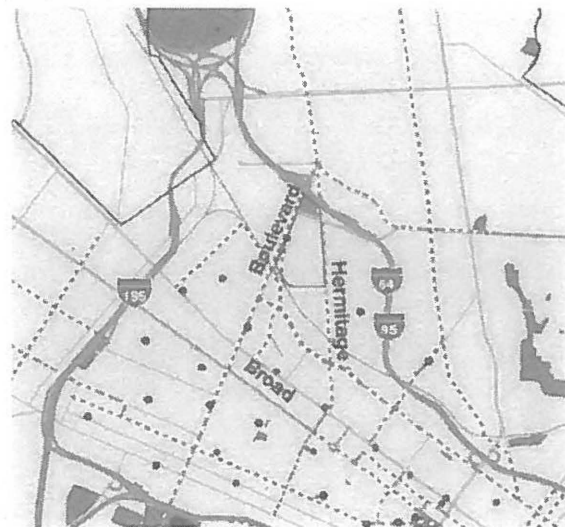
CONNECTIVITY



Bus and BRT Connectivity Only



Bike Connectivity Only







BUS AND PULSE BUS RAPID TRANSIT (BRT)

Local Bus System: GRTC

The Greater Richmond Transit Company (GRTC) operates a route within .25 miles of the site with an average of 53 buses serving this site for this route daily. There are more than 35 bus stops located within a .75 mile radii distance from the site. GRTC will work with Amazon to meet the needs of its workforce.

Pulse Bus Rapid Transit & GRTC

The City of Richmond, in partnership with the (GRTC), is currently in the final phase of implementing a major transit system redesign, featuring:

- A modern 7.6-mile Bus Rapid Transit (BRT) service connecting the east to west side of the City with 10 minute on-peak frequency and 15 minute off-peak frequency.
- A fully redesigned bus network system providing more frequent bus service and connections to the Pulse BRT line.

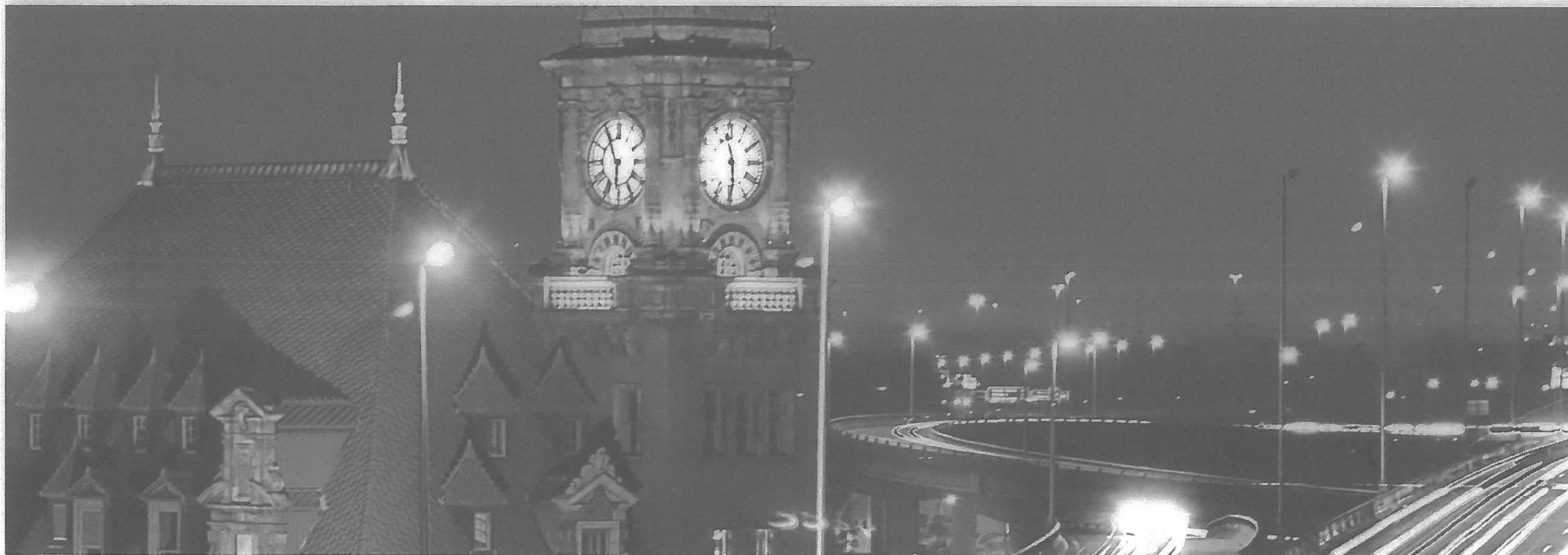
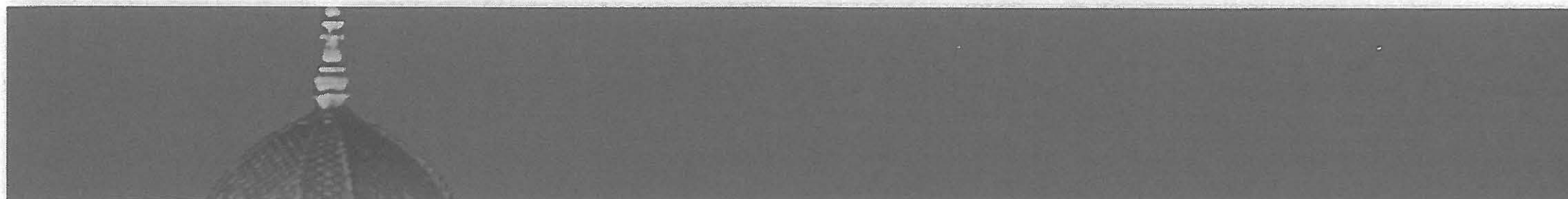
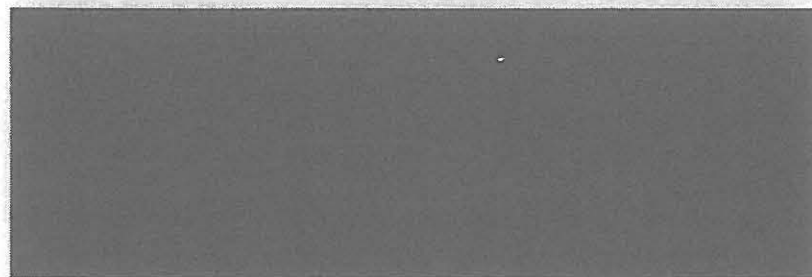
- The City's new transit system will provide nearly 200,000 City residents with access to any transit service, with 113,000 of City residents being located within .5 mile of frequent 15 minute service.
- The City recently rezoned Scott's Addition to align with the Pulse Corridor Plan that supports transit-oriented development through zoning and urban design.

The Boulevard site will be served by reliable local bus service and is situated within close proximity to both the Science Museum and Cleveland BRT stations that will provide employees with easy access to destinations throughout the City. In addition, Amazon employees located at the Boulevard will have a direct BRT connection to intercity passenger rail service at Main Street Station, the region's premier train station and multimodal hub.

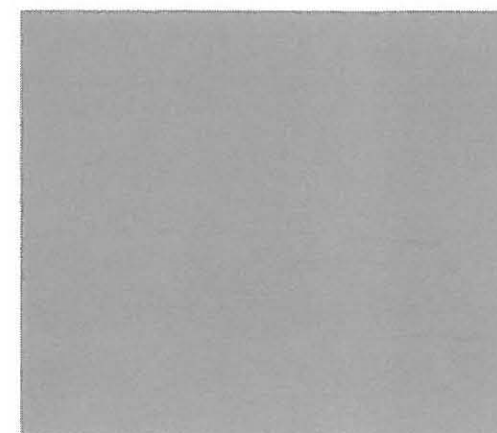
Ridefinders

Ridefinders is a community leader in fostering a strong vanpool and carpool culture with regional user incentive programs. Currently, there are more than a dozen commuter parking lots in the region with 1,800 spaces and growing (three new lots are being constructed).

the **BOULEVARD**
UNABASHEDLY URBAN



MAIN STREET STATION





PEDESTRIAN ACCESSIBILITY AND STREET SAFETY

The site is accessible to pedestrians via sidewalks installed on both sides of N. Boulevard, as well as Robin Hood Road. The site has, as currently developed, a Walk Score of 50, but the next door neighborhood of Scott's Addition has a Walk Score of over 90. Richmond is a Vision Zero city, a Complete Streets city, and a Smart city. Through the use of technology, communications infrastructure, and intentional pedestrian-oriented design, Richmond is dedicated to continuing to grow as a smart and safe community for all.

AMTRAK/RAIL ACCESS

From the Boulevard site to Main Street Station is six minutes, four miles. Main Street Station in downtown is also accessible by GRTC bus, BRT, and Bike Share.

MAJOR BUS SERVICE – GREYHOUND & MEGABUS

From the Boulevard site to the Greyhound Station, it is less than 100 feet. Greyhound Express buses run between Richmond and Newark, N.J., and New York City, with at least three direct round trips daily.

MEGABUS operates bus routes from Richmond's Main Street Station to approximately 12 destinations along the east coast at very low costs while providing amenities such as free Wi-Fi, reserved seating, and individual power outlets.

AIR – COMMERCIAL AND PRIVATE JET ACCESS OR SHUTTLE SERVICE FROM SITE

International Airport: From the site to RIC via I-64 and Airport Drive: 12 miles, 19-minute drive

Executive Airport: From the site to Hanover County Airport: 11 miles, 15-minute drive

PROXIMITY TO POPULATION VIA DIFFERENT TRANSPORT OPTIONS :

According to 2015 Census Data:

- **Walking:** Over 5,000 people currently live within a 20-minute (one mile) walk. Over 3,100 housing units are currently in this vicinity with more planned for development.
- **Biking:** Over 90,000 people live within a three-mile bike ride. 44,000 housing units currently exist within this radius.
- **Bus:** Over 43,000 people are within a 15- to 30-minute bus ride.
- **Driving:** Over 762,000 people live within a 15-mile drive of the site.

the **BOULEVARD**
CONNECTIVITY

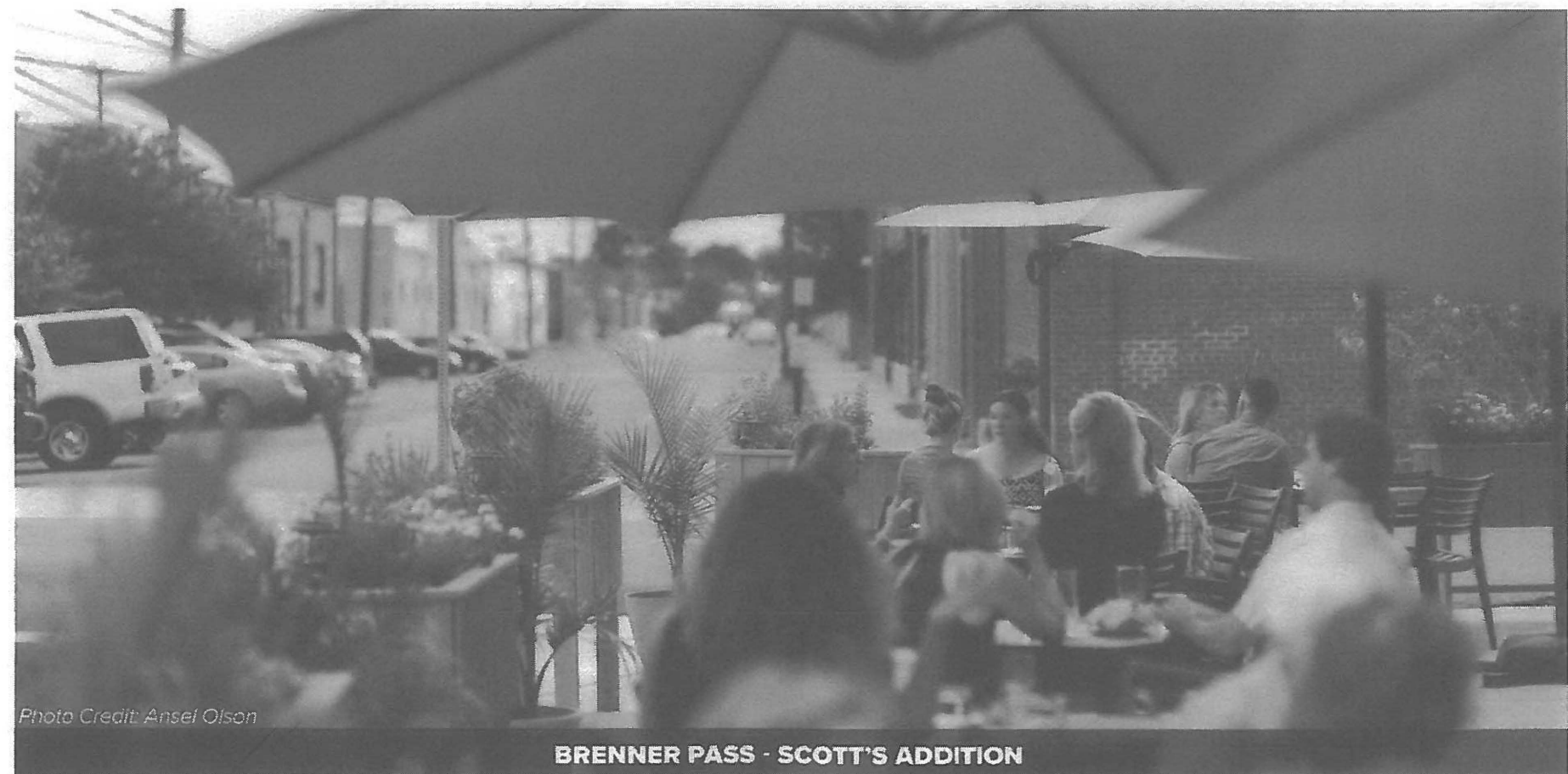
DAILY LIVING, RECREATIONAL OPPORTUNITIES & HOUSING

RESTAURANTS & ENTERTAINMENT

Richmond is a small city with a thriving and sought after restaurant scene. Richmond's food scene constantly receives accolades in national press. Specifically, within a one-mile radius of HQ2 Phase I, there are:

- Over 63 food and beverage establishments ranging from Peter Chang's, which was profiled in the New Yorker, to Moore Street Café, a no-frills diner that is popular among Richmond's police officers, and Boulevard Burgers & Brews, a hopping hipster hang out.
- Approximately 24 arts and entertainment venues including an adult arcade, a hip bowling alley, a movie theater that shows blockbusters as well as art films, and a concert venue.
- Seven breweries, two cideries, a meadery, and a whiskey distillery.

Once HQ2 Phase II is completed, the new minor league baseball stadium will serve not just as a sports venue, but also as an entertainment venue for a variety of events, concerts, and festivals. The stadium could also host Amazon's twice annual employee town halls.



BRENNER PASS - SCOTT'S ADDITION

LIFE

NEIGHBORHOODS

Bellevue, Ginter Park, Rosedale, Sherwood, and Barton Heights feature a wide range of home styles from small bungalows to large four square homes on tree-lined streets with sidewalks that connect to small parks and quaint commercial corridors like MacArthur Avenue.

Scott's Addition is a mixed-use industrial neighborhood that features apartments, businesses, maker-spaces, breweries, cideries, fitness studios, barcades, and every day seems to be adding more exciting uses in renovated industrial buildings and new construction.

The **Near West End** features pre-war homes under an impressive canopy of trees on streets with sidewalks that connect to small commercial districts. The Near West End is home to Windsor Farms, one of Richmond's first "suburbs," which has very large homes (over 3000 sf each) that range from \$600k to over \$1 million.

The **Museum District** is home to the Virginia Museum of Fine Arts at one edge of the neighborhood, and features single-family homes with a sprinkling of commercial destinations within the neighborhood, like Boho Cycle Studio, Northside Juice Co., and Black Hand Coffee.



Carytown is defined by the commercial retail strip on Cary Street that is home to quirky clothing stores, a wide range of restaurants, and a historic movie theater that shows recent blockbusters for \$4 a ticket and features music from an organ on a hydraulic lift on Saturday nights. Every Spring, Carytown hosts the French Film Festival, which is the largest French Film festival outside of France and draws francophiles from all over North America.

The **Fan** is listed on the National Register of Historic Places and features beautifully renovated Victorian-era homes nestled in a very walkable, urban neighborhood with excellent access to pocket parks and retail within walking distance. The Fan is on the edge of VCU's Monroe Park Campus.

Carver is listed on the National Register of Historic Places with a period of significance between 1840 and 1920. The neighborhood developed into a community of primarily working-class residents and by 1930 had become a strong African-American community. The architectural styles represented are from the nineteenth century, most frequently Italianate and Greek Revival.

-  Boulevard Site
-  1/2 mile walkshed radius
-  1 mile walkshed radius
-  Park
-  Water
-  Highway
-  Road

There are 734 businesses within 1 mile of the Boulevard including 7 hotels, 22 entertainment venues, and 49 restaurant/bars, those shown on this map are merely representative of the amenities in the area.

-  Restaurant/Bar
-  Coffee Shop
-  Brewery/Meadery/Distillery/Cidery
-  Entertainment
-  Culture
-  Pet Care
-  Fitness/Gym
-  School
-  Daycare
-  Grocery/Hardware Store
-  Pharmacy
-  Hospital
-  University



Healthy Food at Elwoods



Wine at Secco



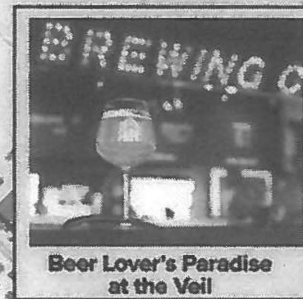
World Class Art at VMFA



Coffee at Black Hand



Greek at Stella's



Beer Lover's Paradise at the Veil



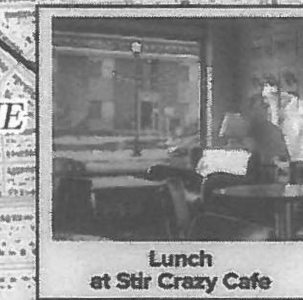
Endless Play at the ARC Park



Documentaries & Indies at Movieland



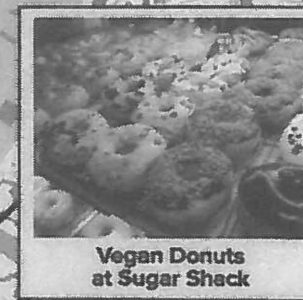
Push Press at Crossfit RVA



Lunch at Stir Crazy Cafe



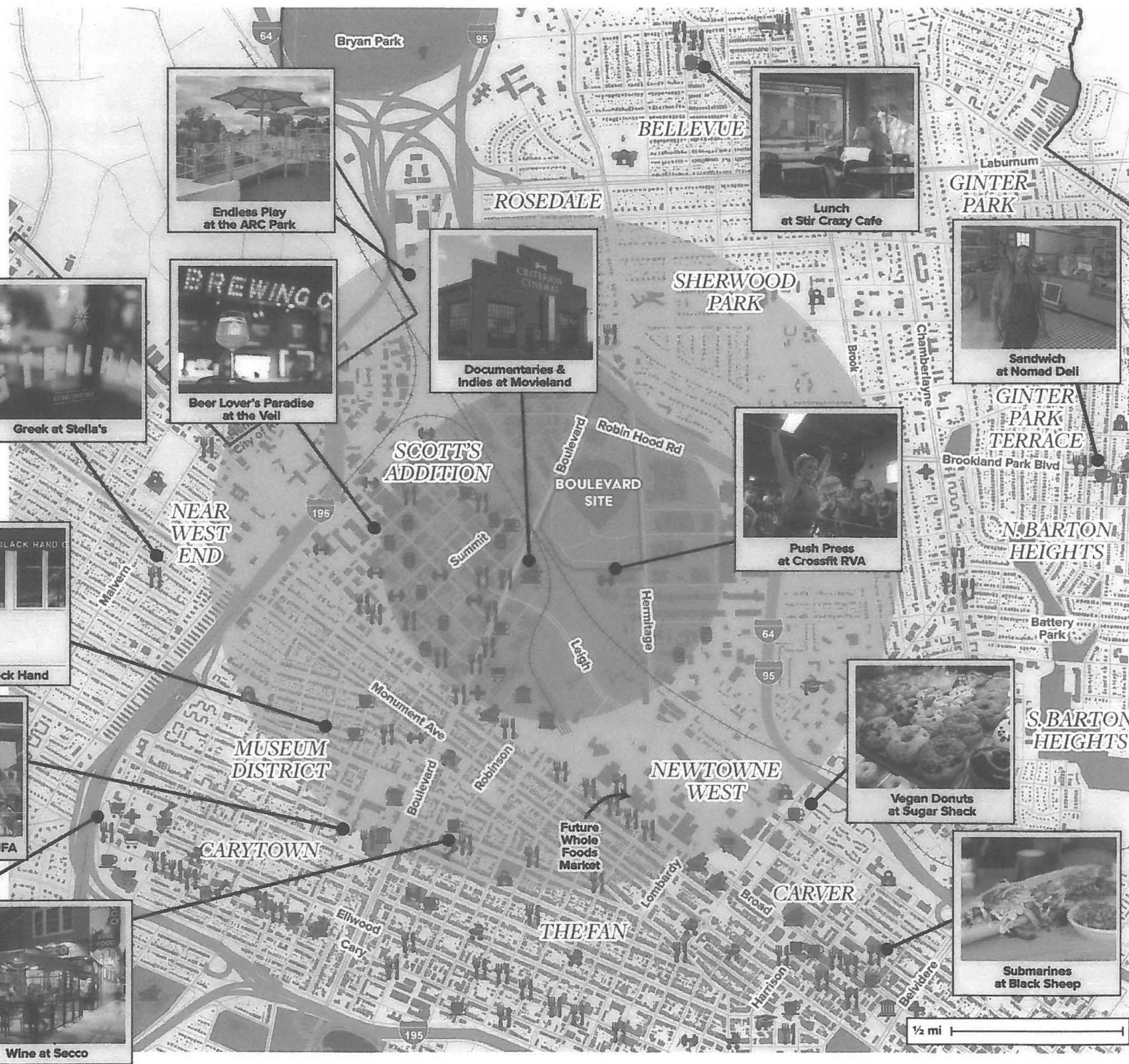
Submarines at Black Sheep



Vegan Donuts at Sugar Shack



Sandwich at Nomad Deli



HOUSING

Available for sale/rent
within 2 mi of site

RENT
The Preserve
\$1225
1br/1ba apt



OWN
4108 Stuart
\$547,000
3bd/4ba 2204sf
1930s home



OWN
3318 Park Ave
\$330,000
3bd/3ba 2239sf
1920s home



OWN
1906 Hanover
\$795,000
3bd/3ba 2934sf
1900s home



RENT
2107 Floyd
\$2,300
3bd/2ba



RENT
The Altamont
\$1244
2br/2ba 1100sf
apt



OWN
4510 Leonard
\$349,900
2br/3ba 1296sf
1980s home



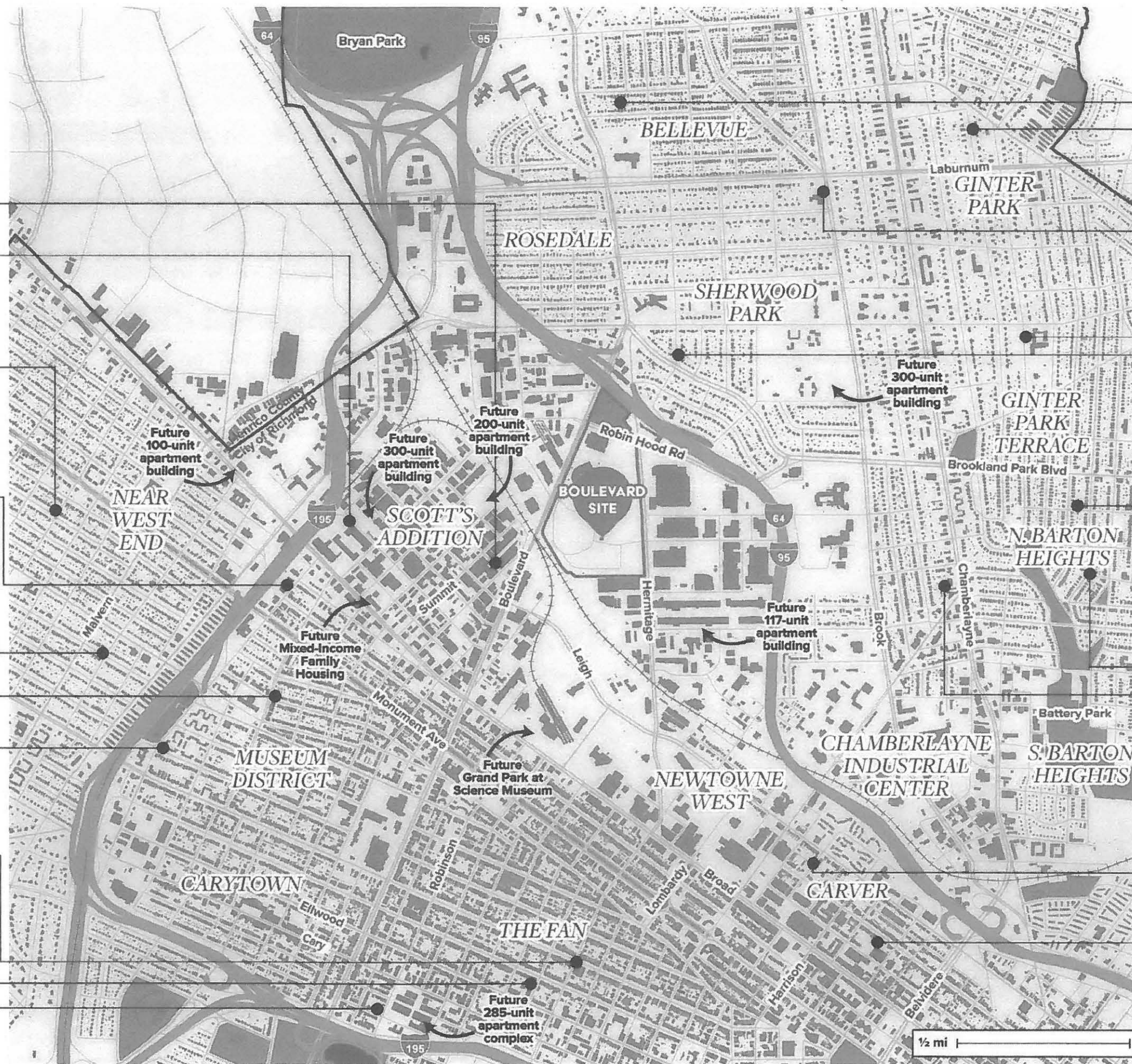
OWN
3420 Cutshaw
\$450,000
3bd/3ba 1717sf
new construction



RENT
Gallery at
Midtown
\$1,000 1 bd/1ba
580sf apt



OWN
2612 Grayland
\$294,900
3bd/2ba 1170sf
1920s home



OWN
1623 Nottoway
\$299,000
4br/2ba 1315sf
1950s home



OWN
3813 Noble
\$200,000
3bd/3ba 1666sf
1940s home



OWN
3130 Moss Side
\$349,950
4br/3ba 2,200sf
new construction
home



RENT
1200 Laburnum
\$1,150
3bd/2ba 1400sf
1930s home



OWN
3311 Chatham
\$324,950
3br/2ba 1754sf
1940s home



OWN
2906 Edgewood
\$324,900
4bd/3ba 2100sf
1920s home



RENT
1003 Edge Hill
\$1,250
3bd/1ba 1440 sf
1920s home



OWN
2713 Griffin
\$249,900
3bd/3ba 1320sf
1920s home



OWN
925 W Clay
\$290,000
4bd/3ba 1792sf
1900s home



RENT
1415 W Leigh
\$1,300
2bd/1ba 1406sf
1900s home

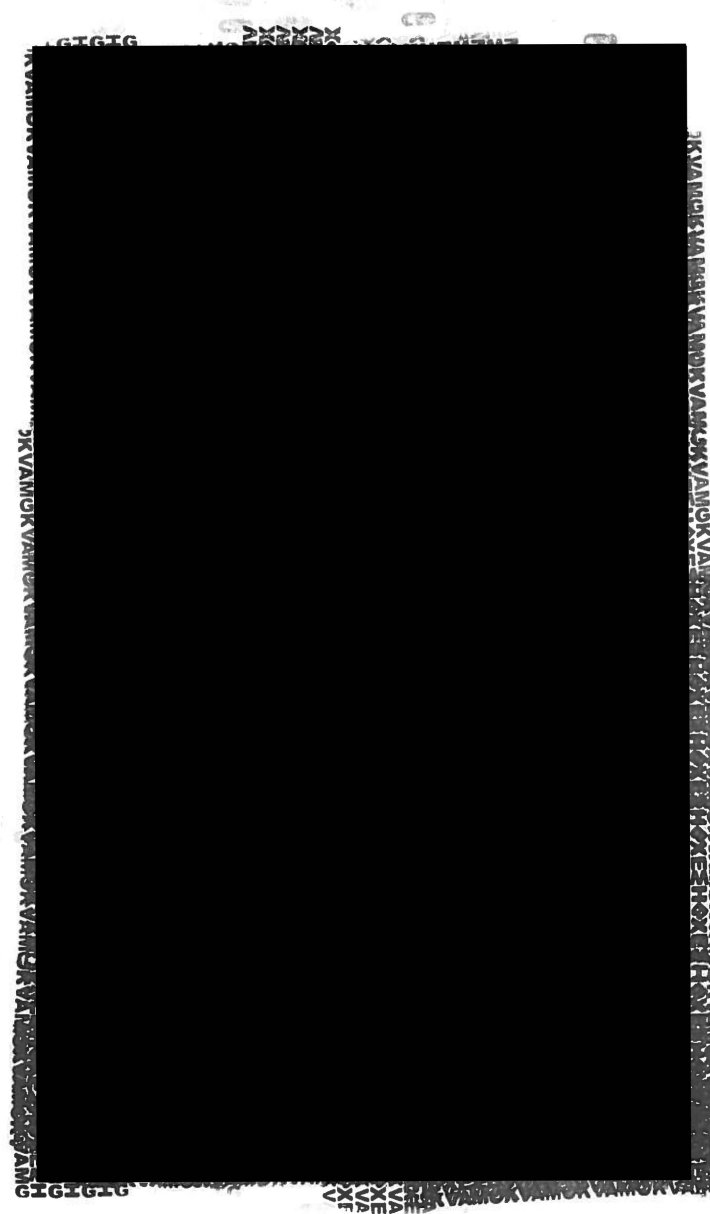


TIMELINES

INCENTIVE APPROVAL PROCESS AND TIMELINE

Normally, the total process will take 45 days in order to meet statutory notice requirements. The following are the typical steps for the introduction and adoption of an Ordinance in the City. Please note, however, that amendments and other factors could impact the actual timeline of any Ordinance.

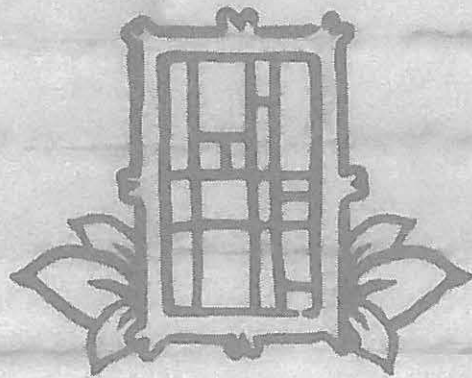
1. Draft Ordinance and Response Request
2. Circulate internally for all reviews and approvals
3. Submit to the City Attorney's office for review and approval
4. Submit to the City Clerk for inclusion on Docket
5. Introduction of the Ordinance
6. Referral by Council to Council Committee
7. Referral by Council Committee back to Council
8. Public Hearing





VIRGINIA MUSEUM OF FINE ARTS IS THE 10TH LARGEST COMPREHENSIVE ART MUSEUM IN THE COUNTRY.





The Galleria

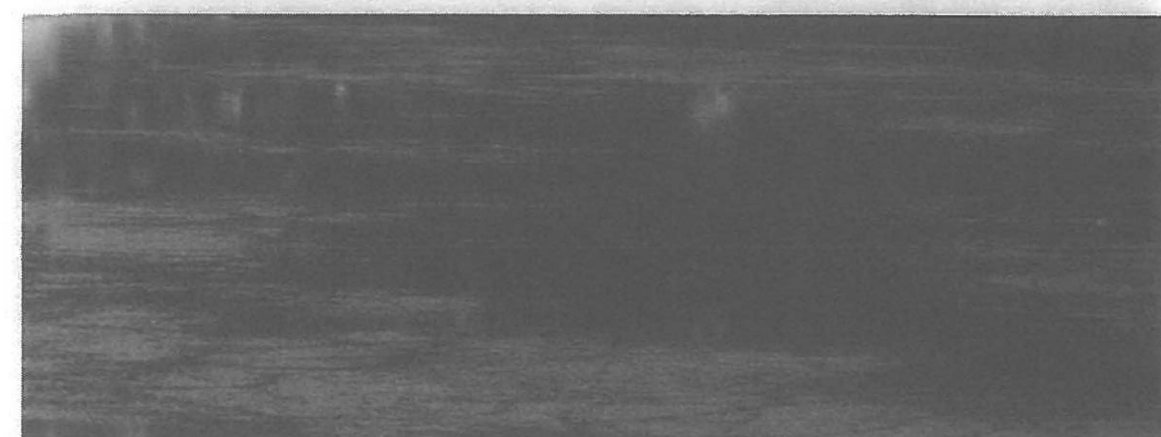
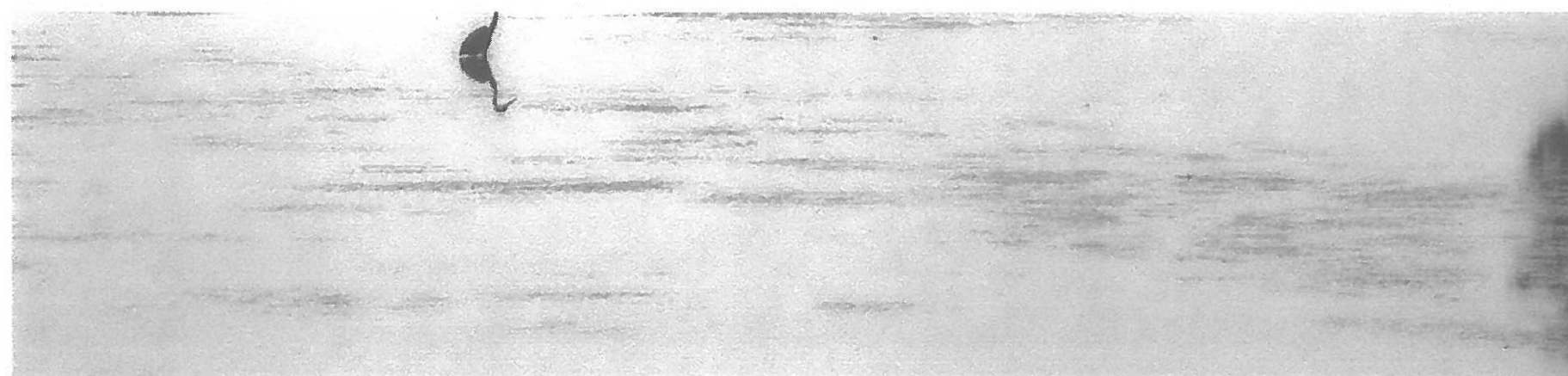
A WELCOMING COMMUNITY

Embedded in a residential area with immediate access to a network of highways and a state park, the Galleria site is well positioned to be an engaging Amazon HQ2. The site and region has history that spans Native American and colonial periods through the Civil War and the Industrial Revolution right into the technology revolution of today. The site is a greenfield development while at the same time offering a bespoke solution in an urban location.

Currently surrounded by bus routes and connected to what will become the first light rail to the central business districts and the development of the western Richmond region, the site's connectivity cannot be matched.

Amazon and Chesterfield are already partners and Amazon has experienced Chesterfield's ability to get things done that others can't and do them faster than the rest of the nation. That same effort is already on display and should give Amazon assurance that they will fulfill their plans within the time limits projected.





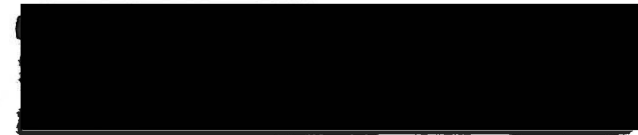
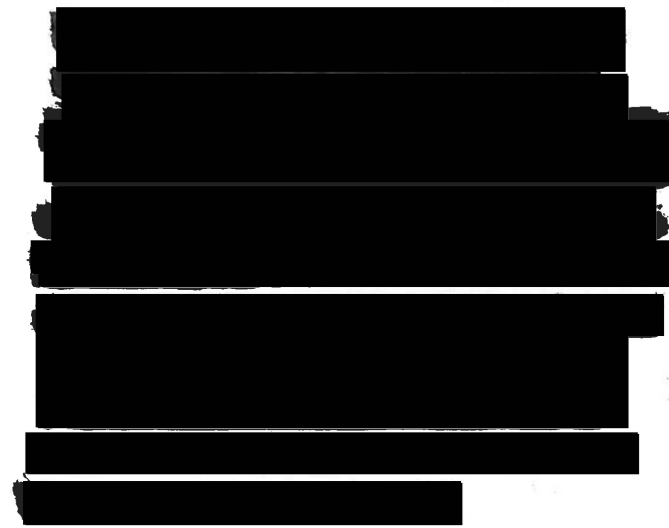
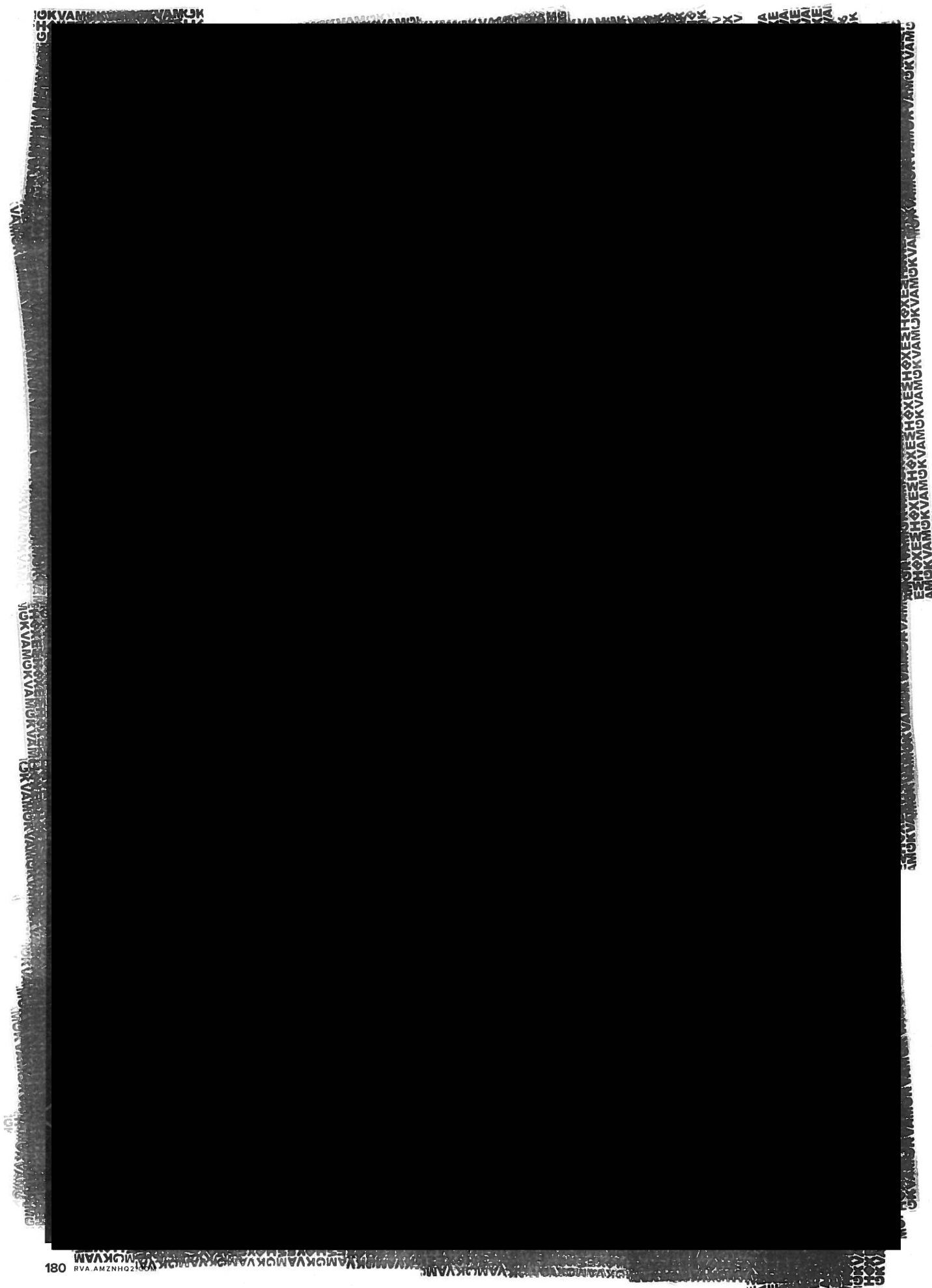
As urban development patterns transitioned from the “spoke and wheel” to the “Beltway” concept that connected the spokes growing from downtown to suburban growth, “inner rings” were created. Chippenham Parkway was the first such ring road in Richmond that now connects the western, southern, and eastern “inner” communities by joining with Parham Road and the newly constructed 895. As a result, these inner ring communities present infill opportunities.

Other property owners in the area include HCA Chippenham Hospital, Bond Companies, Dominion Realty Partners, and the Chesterfield County Economic Development Authority (EDA).

Immediately across the street is the City’s Powhite Park that allows for hiking and mountain biking along the creek with a similar name. Dominion Realty Partners recently purchased three of the diverse assets of the Boulders Office Complex with their sights on participating in this area’s revitalization. At the south end of the Edge City, the profitable and dynamic Stonebridge Development is currently entering its final stages and the EDA is looking to seed the area with its next major revitalization investment.

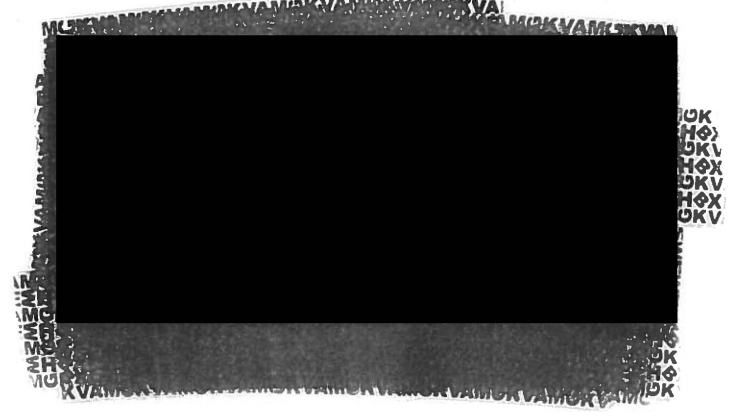
The County’s vision for launching HQ2 is through the creation of a dynamic, vertically integrated, mixed-use headquarters on the parcel bordered by the rail line, Chippenham Parkway, and the southbound lanes of Powhite Parkway.

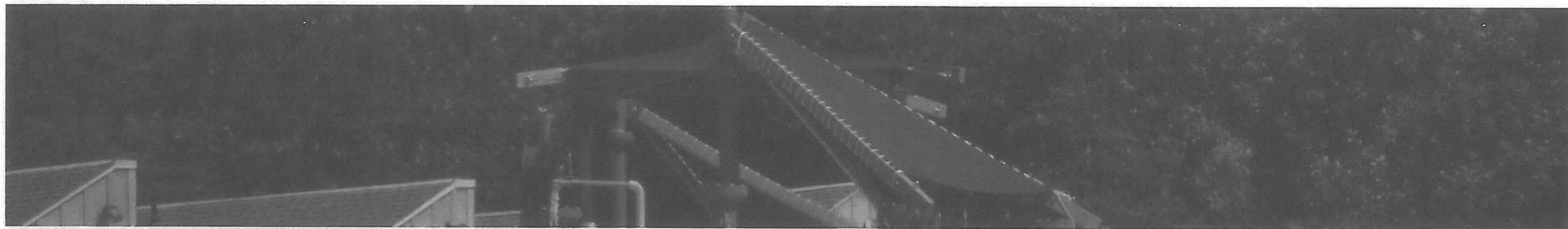
the **GALLERIA**

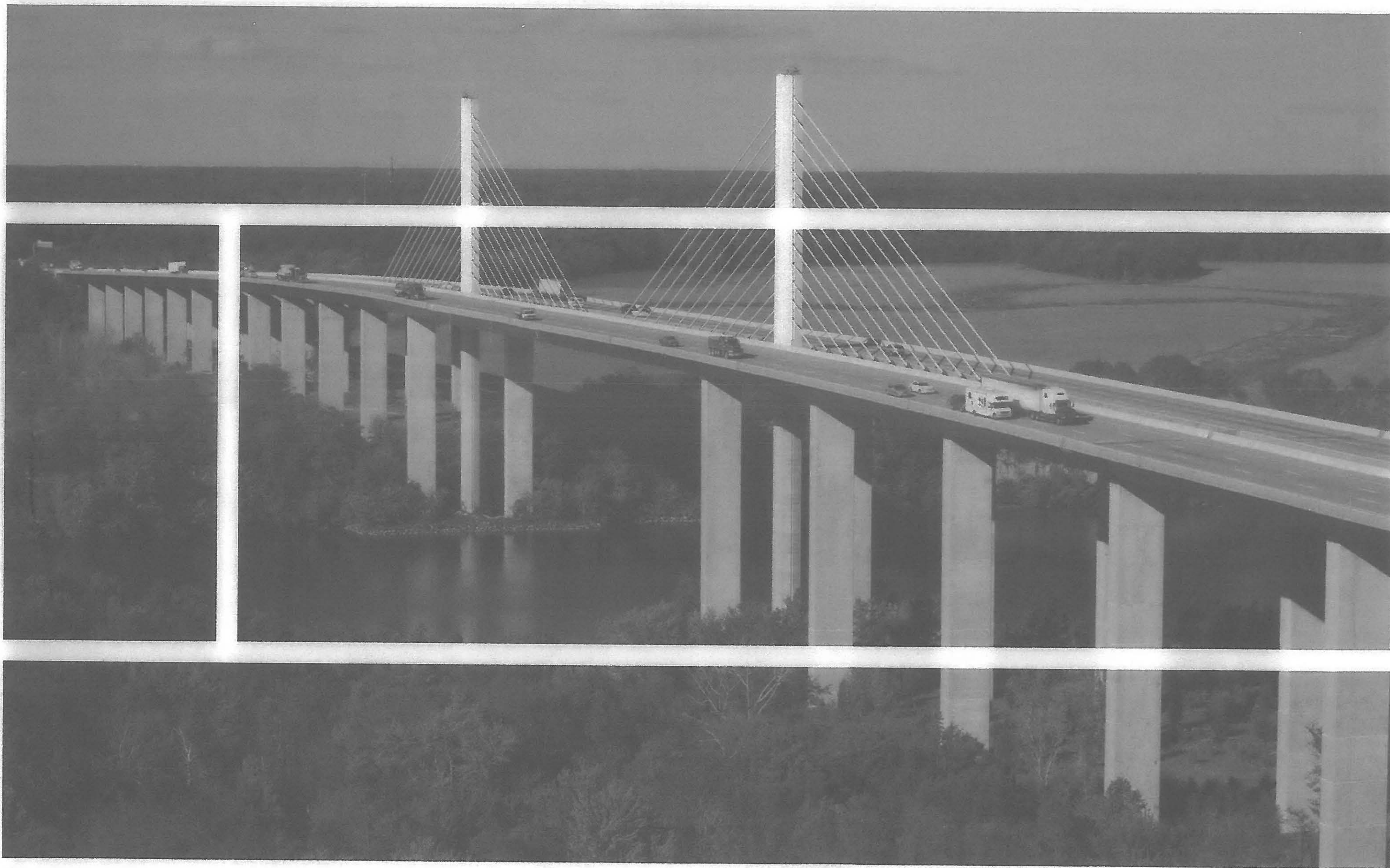


These strategic corners can also accommodate mixed use to further provide retail opportunities close to the anchor campus, the hospital, and park.

This is consistent with the County's vision of making the existing Boulders Office Park a more dense, vertical, vibrant 16-hour "Mid-Town" destination anchored by the hospital and adjacent Powwhite Park.





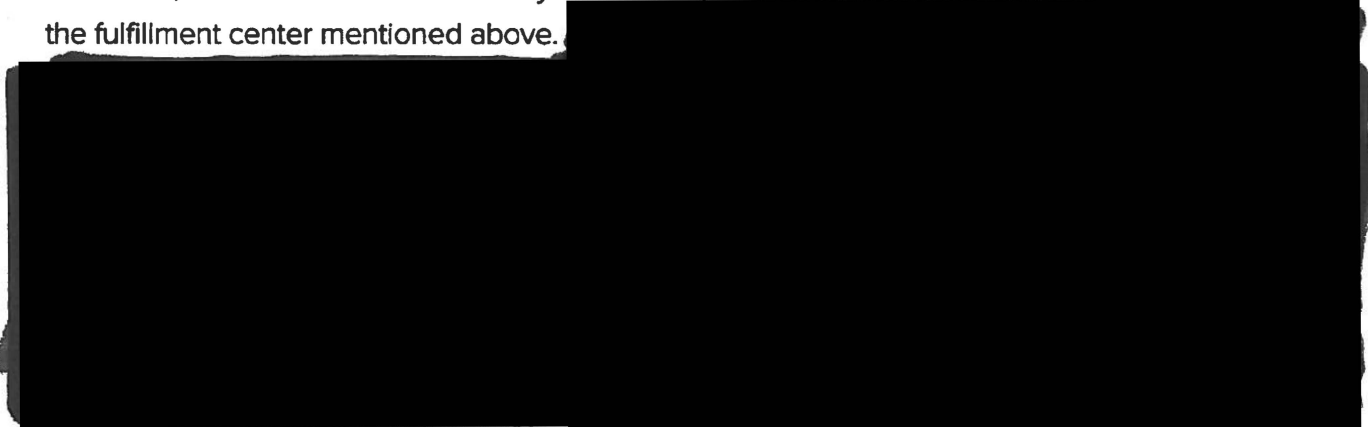


DEVELOPER BACKGROUND

With one experienced owner, who has agreed to work with Chesterfield County to create whatever palate Amazon's imagination conceives, the development and associated real estate transactions become forthright and efficient.

Chesterfield County realizes that Amazon will need to understand and then effectively manage the risk associated with this important real estate decision. The County helped the company and their preferred developer, Seefried Industrial Properties, manage the real estate, and later the construction risk when Amazon selected Chesterfield County as a site for their one million-square foot "sort" fulfillment center. That facility is located within a park owned and maintained by the Chesterfield County Economic Development Authority (EDA), which is one of the most progressive public land development entities in the United States.

Of course, Amazon will have the ability to select a preferred developer in the same way they did on the fulfillment center mentioned above.



SITE PLAN



The Chesterfield County Department of Utilities provides water and wastewater service to commercial, industrial, and residential customers in the County. It is a public utility that uses state-of-the-art technology to deliver the highest quality service to its customers. The department is one of only a handful of water and wastewater utilities in the nation to have achieved AAA ratings on its revenue bonds from each of the three top rating services, including Fitch Ratings, Moody's Investors Services, and Standard & Poor's. The county already has existing water and wastewater infrastructure in place to serve the Galleria. There are several exiting sanitary sewer lines, varying from 18" to 42", that can serve the site. There are also several existing water lines, varying from 6" to 18", that can serve the site.

Dominion Energy is the major provider of electric service to the Richmond region. Dominion offers a variety of rate options that may lower operating costs for commercial users. Dominion can deliver consistent, high-quality electricity

Chesterfield County has one of the highest broadband coverages of localities in Virginia, with coverage of over 97%. The County is served by all fiber service providers serving the state of Virginia. With both lit and dark fiber crisscrossing the County, the Galleria is digitally well-connected.

Chesterfield is directly connected to MAE-East locations in Vienna, Reston, and Ashburn, Virginia, by direct fiber running up Interstate 95. One of the primary fiber loops delivering a direct connection to the U.S. from the Virginia Beach, Virginia landing of MAREA goes directly through the County. Dark fiber is already in place for the increased traffic from this new connection to Europe.




HENRICUS HISTORICAL PARK

SUSTAINABILITY

LEED CERTIFICATION

Chesterfield County is committed to sustainable development. The County's two recent major government construction projects, the 90,000-square-foot Community Development Customer Service Center and the new North Courthouse Road Library are both LEED-certified and serve as excellent examples of the county's dedication to smarter development strategies. The Chesterfield EDA, the developer, and Amazon's development team will work together to meet Amazon's sustainability desires.

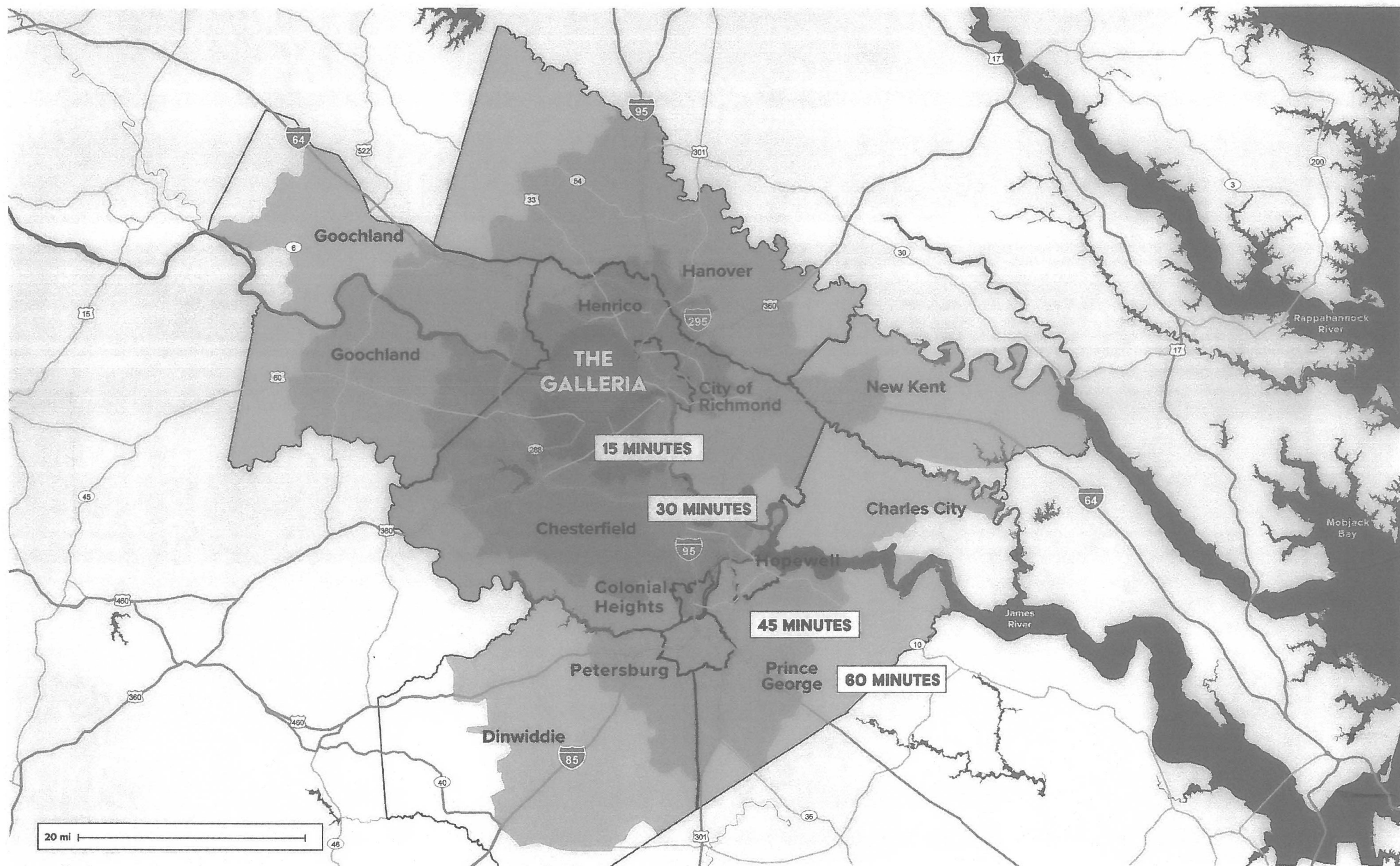
GREEN SPACE

 The design includes an emphasis on preserving as many natural features as possible.

Adjacent Powhite Park hides among busy roads, quiet neighborhoods, and a hospital complex. The park is over 100 acres of hardwoods and understory beeches and hollies on hillsides looking down on a bottomland swamp. Hikers, bikers, birdwatchers, and dog walkers can all spend hours here exploring the trails, marveling at the scenery, and feeling like they're in on a secret.



the **GALLERIA**
SUSTAINABILITY



CONNECTIVITY

PROXIMITY TO KEY INFRASTRUCTURE

The Galleria site is centrally located within the Greater Richmond region. This central location puts it in the heart of the region's population. The site is also easily accessible by car. Located in the center of the Greater Richmond MSA, the Galleria is only 13 minutes to Interstate 95, which runs the entire length of the East Coast from Maine to Miami; 10 minutes to Interstate 64, running west; and 30 minutes to Interstate 85, which runs southwest towards Atlanta. It is less than 30 minutes from most of Chesterfield County's newest residential communities and the dense residential concentration in the Western part of Henrico County. It is also just a quick 13 minutes to downtown Richmond.

The airport is a less than 30-minute drive from the Galleria via the Chippenham Parkway (Route 150) and the Pocahontas Parkway Toll Road (I-895).

Chesterfield County also has an Executive Airport located approximately 19 miles from the site, a short 30-minute drive.

TRANSPORTATION NETWORK

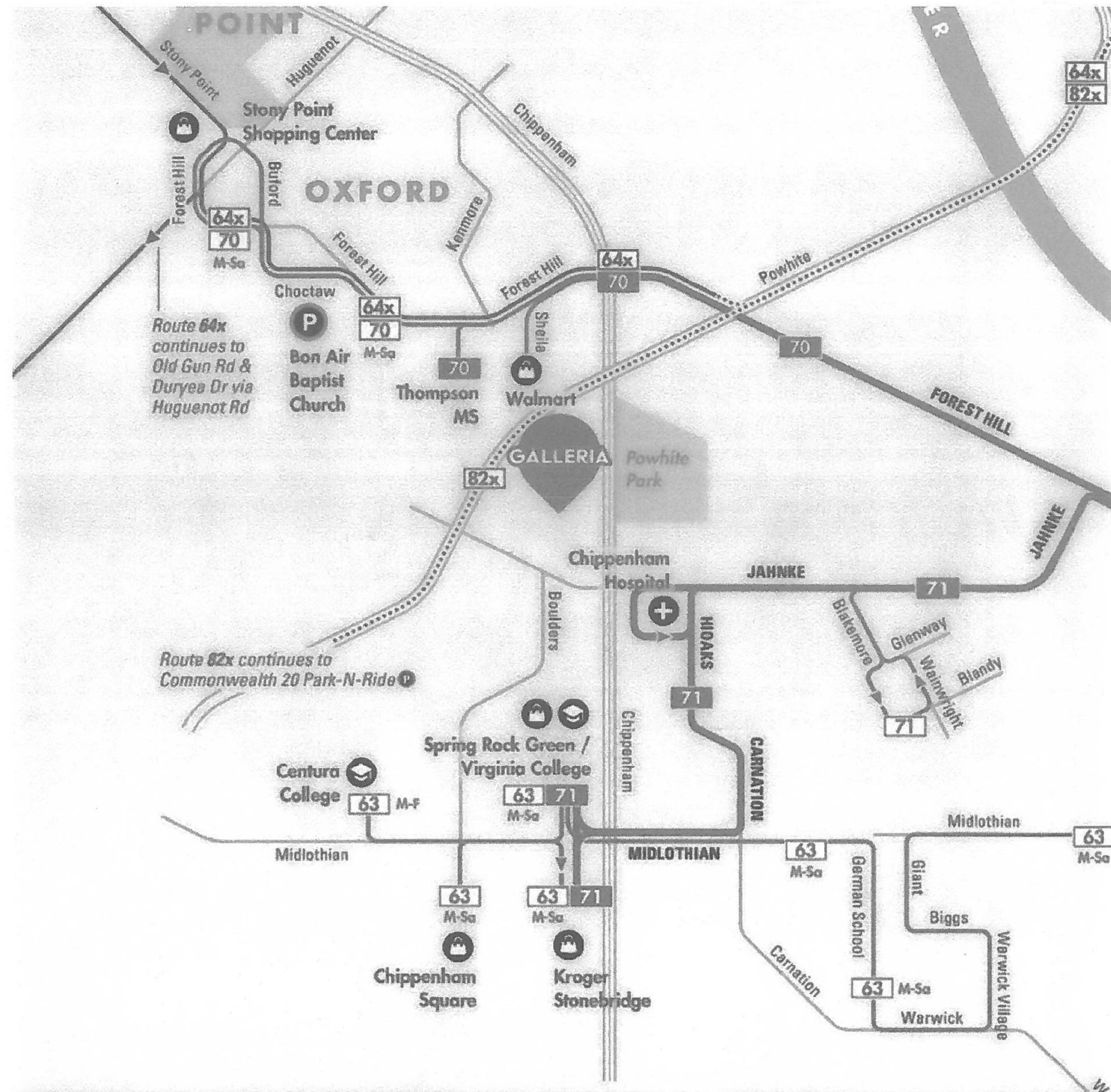
Auto

The site is accessed by two limited access roadways, the Powhite Parkway (Route 76 toll road) and Chippenham Parkway (Route 150), and only a 10-minute drive to Interstate 95. Powhite Parkway is EZ Pass-compatible.

Overall traffic congestion on this commuter route is low.

Transit

In addition to access by automobile, transit options are available at the Galleria site. Currently, there are multimodal improvements underway at Jahnke Road to the south and Forest Hill Ave to the north. Connecting these two arterial roads through an intra-site road would form a loop and connect to multimodal capabilities.



EXISTING GRTC ROUTES EXTEND TO THE SITE BOUNDARIES. EXPANSION OF THE ROUTES IS POSSIBLE.



Commuter Light Rail could also be established by steel rail repurposing of the underutilized existing shipping line that runs from the site directly into the heart of downtown.

- BRT expansion from Chesterfield County, western Henrico County, and from downtown Richmond (Greater RVA Regional Transit Vision Plan).
- Extensions of under-construction premium transit: The Regional Transit Vision Plan outlines several BRT Routes. One such route would run from downtown Richmond along Midlothian Turnpike (a major corridor about two miles from this site) to Chesterfield Towne Center, a large shopping mall and regional commercial area.
- Fast connections via express bus routes between downtown Richmond and the site. This would encompass the needs of “reverse commuters” from the urban neighborhoods, as well as offering connections to VCU.
- Enhanced local all-day service from the site to nearby shopping centers, such as Spring Rock Green, The Shoppes at Stonebridge, and Stony Point, to allow for connections to other transit service and to offer dining and retail shopping options.

Biking and Walking

Chesterfield County recently adopted the Bikeways and Trails Plan (2015) that identifies separate shared-use paths and bike/pedestrian improvements along arterial roadways in the area of this site. Improved bicycle and pedestrian connections will improve transit connectivity.





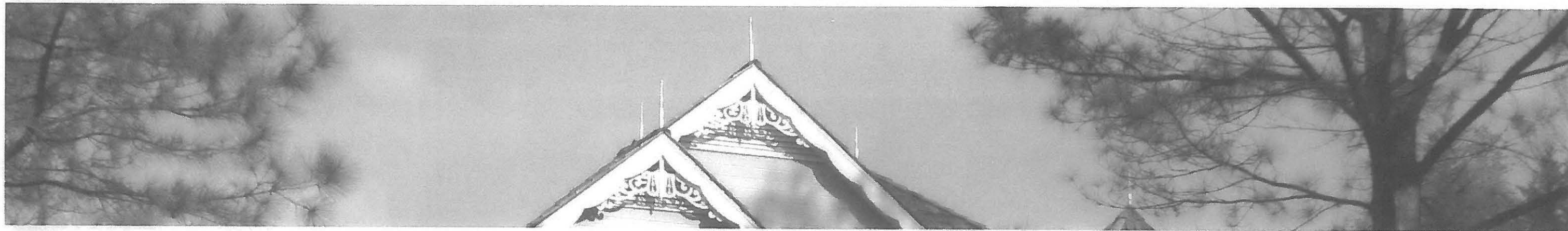
HOUSING

One advantage of the Galleria's central location is that it provides for a wide variety of convenient housing choices. The site Chesterfield County proposes as the home for HQ2 is located within proximity of the Village of Bon Air. Bon Air was established as one of the first suburbs of Richmond. It was originally conceived as a resort area in the late 19th century, and is now a designated National Historic District. The village core contains vibrant, unique retail and restaurants. Amazon's new HQ2 at the Galleria is located within a short walk, bike, run, or ride of the Village of Bon Air.

Hallsley, located in western Chesterfield County was recently selected as the "Best Master Planned Community of the Year" by National Association of Home Builders. Hallsley offers unique architectural styles and first-class family amenities.



WITHIN A 5, 20, AND 40-MINUTE COMMUTE,
HOUSING OPTIONS COVER EVERY LIFESTYLE

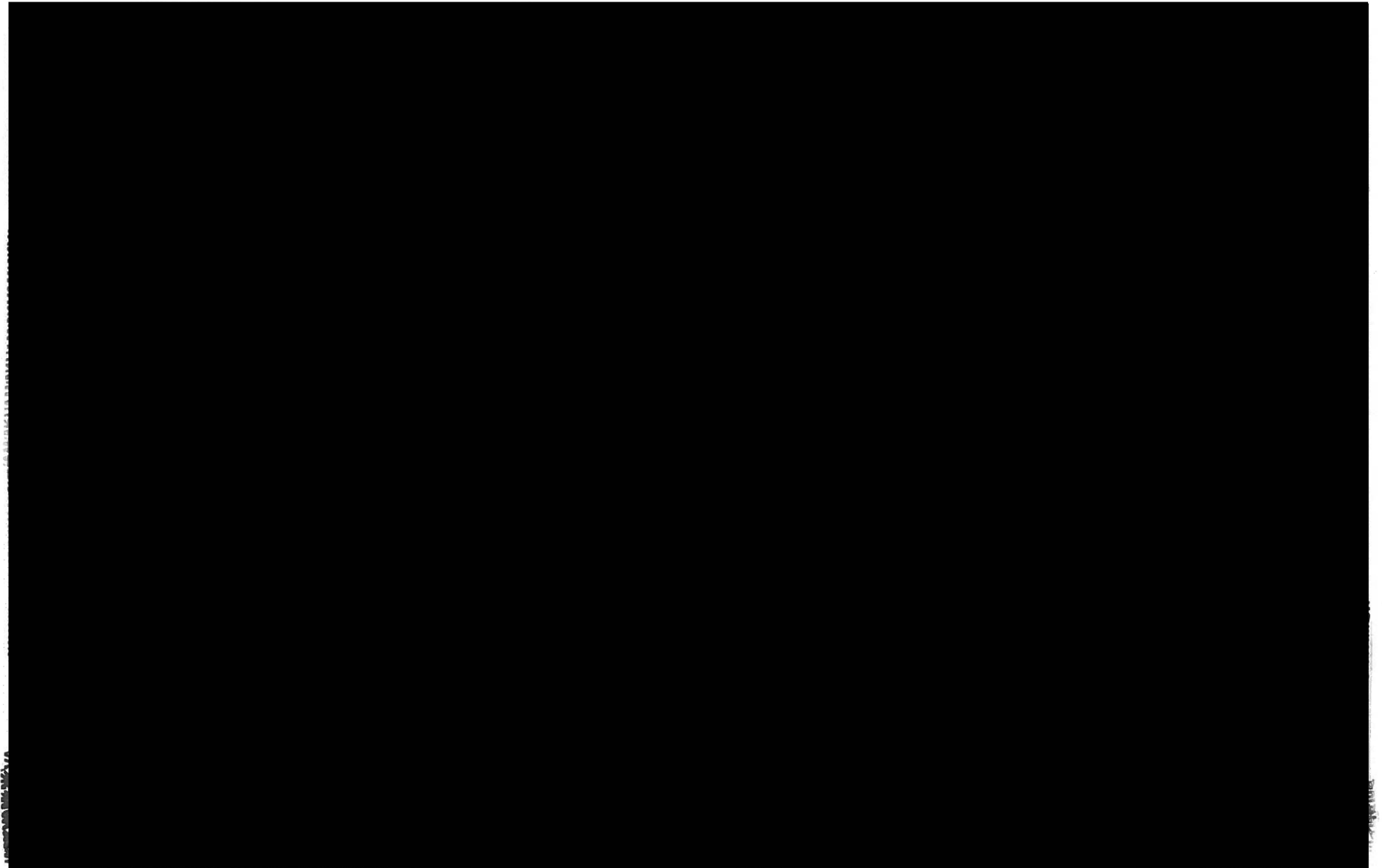


BON AIR

QUALITY OF LIFE

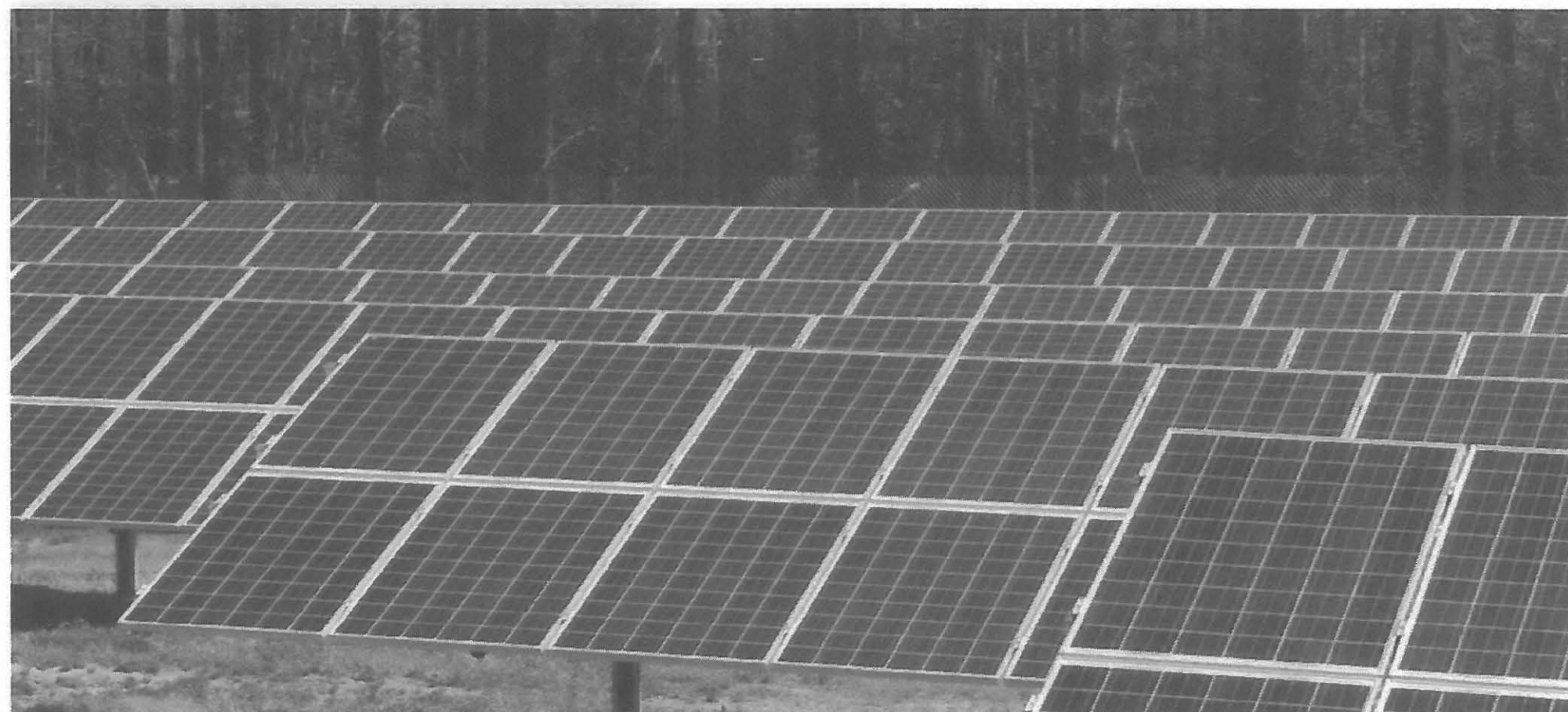
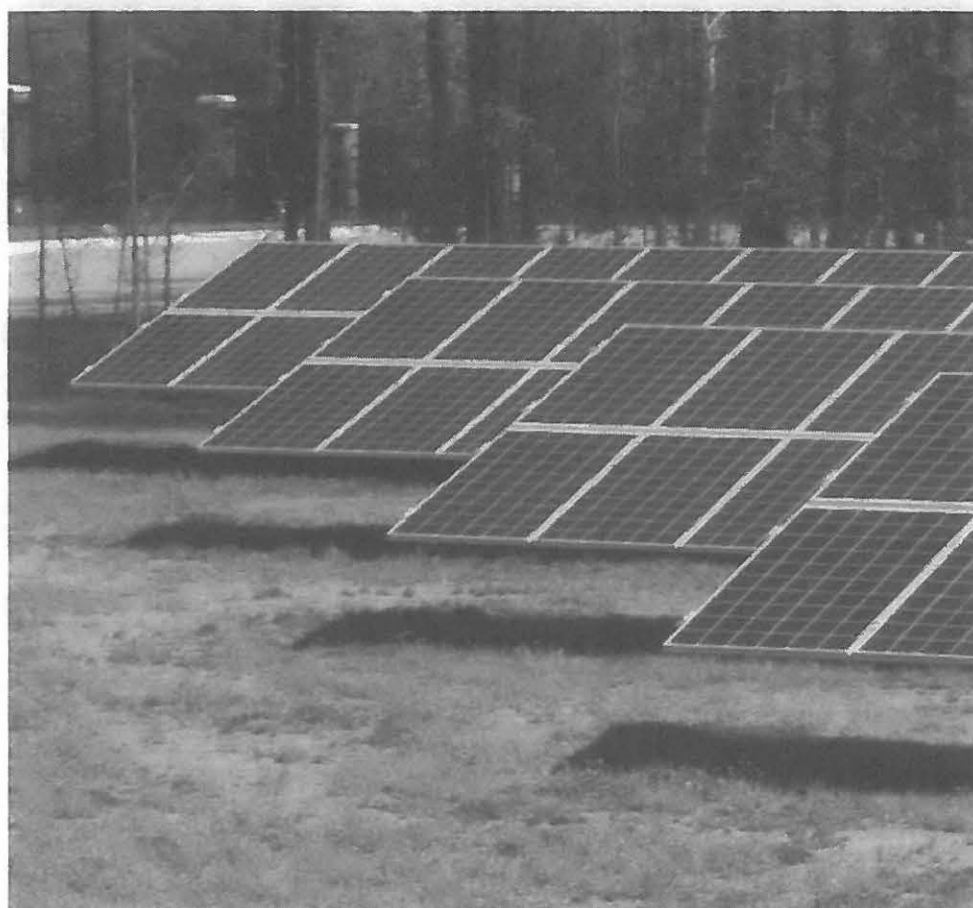
The Galleria is located adjacent to the Powhite Parkway and Chippenham Parkway, providing easy access to the region's bounty of shopping, dining, entertainment, and recreation choices.

Forest Hill Avenue is to the north of the property line with Target, Publix, Lowes, Walmart, and numerous dining options. To the south, at the Chippenham/Midlothian Turnpike Interchange, is Stonebridge, a mixed-use development with the largest Kroger in the Mid-Atlantic; the Elements, a luxury apartment community, and Richmond Volleyball Club, opening in late 2017.



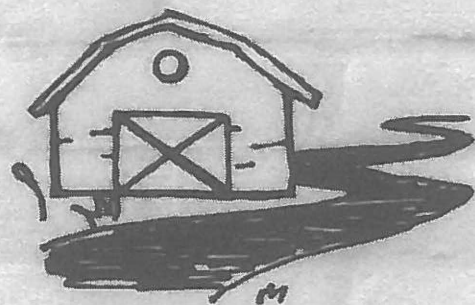


AMENITIES WITHIN THREE MILES OF GALLERIA









Tree Hill

COME FOR SUCCESS. STAY FOR LIFE.

In Henrico County we share Amazon's principal of "customer obsession." We call this the "Henrico Way" and in every decision, we are focused on outcomes, not process. We are accountable, collaborative, and pragmatic. We know that great communities are not accidents, and we focus on providing a cost-competitive environment for business to grow and prosper.



THE AREA

Henrico County is home to a wide range of businesses, ranging from Fortune 500 corporate headquarters to advanced manufacturing facilities and large logistics operations. Our well-educated and diverse workforce, stable business environment, and competitive operating costs are complemented by our strategic location on the East Coast, affordable cost of living, and high-quality amenities available throughout the community.

BUSINESS WORKS IN HENRICO

Henrico County is committed to business success. Henrico's triple AAA bond rating places it in the top 1% of counties in the United States, and this assures businesses of a stable, fiscally sound government. Further, Virginia is a right-to-work state with low unionization activity and has a constitutionally mandated balanced budget. The County Board of Supervisors and Management team continually evaluate Henrico's tax rates and policies to respond to business needs for competitive operating costs.

The County is unique in that it has a county manager form of government. The county manager functions as a CEO with the board of supervisors as a board of directors. This form of government requires efficiency and streamlines operations into clear areas of responsibility with a matrix of accountability for everyone within the organization. This is the single most important decision the voters have made in modern history of Henrico and has a direct effect on the responsiveness to citizens and businesses located here.

Henrico is the employment center of the region with over 190,000 employees in the County. Henrico has a culture of innovation and entrepreneurship. There are over 30,000 businesses in the County with over half being 1-4 person establishments. CEOs and their teams are attracted to our large pool of qualified workers, affordable cost of living, and high quality of life. They choose to set up operations in Henrico because our labor, education, and support services create a solid foundation for business growth.



Capital One

AECOM



Hamilton Beach
Good Thinking.



McKESSON
Empowering Healthcare

snagajob



ChildFund.
International

BRINKS

Mondelēz
International



FAREVA
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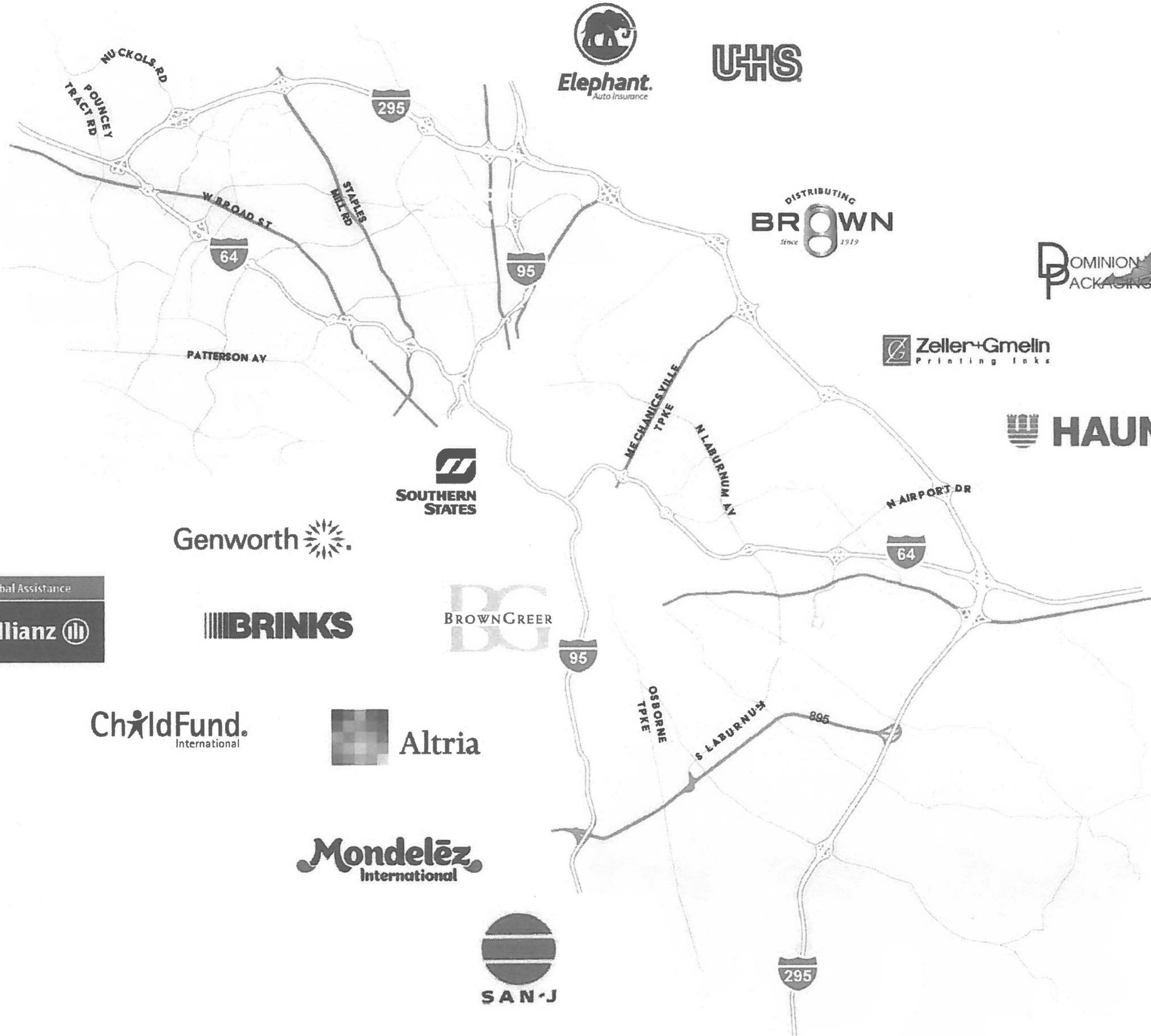
Data Centers without Compromise®



LUMBER
LIQUIDATORS
HARDWOOD FLOORS FOR LESS!



BREAKTHRU
BEVERAGE
VIRGINIA

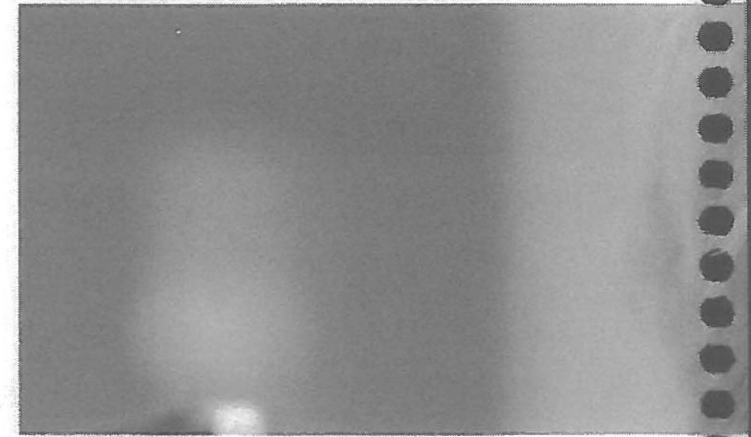


GROOMING THE FUTURE AMAZON WORKFORCE

Academic excellence and opportunity are hallmarks of Henrico County Public Schools (HCPS), giving you a strong pipeline to future talent. All students have the opportunity to graduate having already earned college credits and workforce credentials, including certifications and licensures for computer science and robotics. Workplace readiness skills are also woven into classroom instruction systemwide.

- 90% of Henrico's population has a high school diploma or equivalent
- 91% on-time graduation rate
- 40% have a bachelor's degree or higher

Henrico has 15 advanced specialty centers for students including two career and technical education (CTE) centers, with planning underway for a new center and renovations for the existing centers. Our CTE centers serve middle, high school, and adult education students looking for cutting-edge programs to further their learning and career goals. By proactively partnering with businesses, we ensure CTE programs and curricula prepare students to participate in our economy. Henrico would love to have Amazon as a partner as we redesign our CTE programs to create a direct pipeline for employment at their new headquarters.





THE SITE

Tree Hill is ideally situated to meet all Amazon's needs and wants as a new home for its second headquarters. Whether that home is a sprawling corporate headquarters, an active urban campus, 10-story office building, or any number of designs in between – Tree Hill has amazing opportunity.

Tree Hill's 524 acres lie within the Varina district of Henrico, only a mile from the southern limit of the City of Richmond, and borders the James River, Virginia's historic river of commerce, for over 1.5 miles. Fronting on Old Osbourne Turnpike (State Route 5) along the 52-mile Capital Trail, the property offers both easy access to the City and an impressive view of its skyline.



VIRGINIA CAPITAL TRAIL

James River

RECREATION AREA

James River

PRIMARY DEVELOPMENT AREA

Adjacent Parcels
Available

Future Access
Road

Old Osborne Tpke

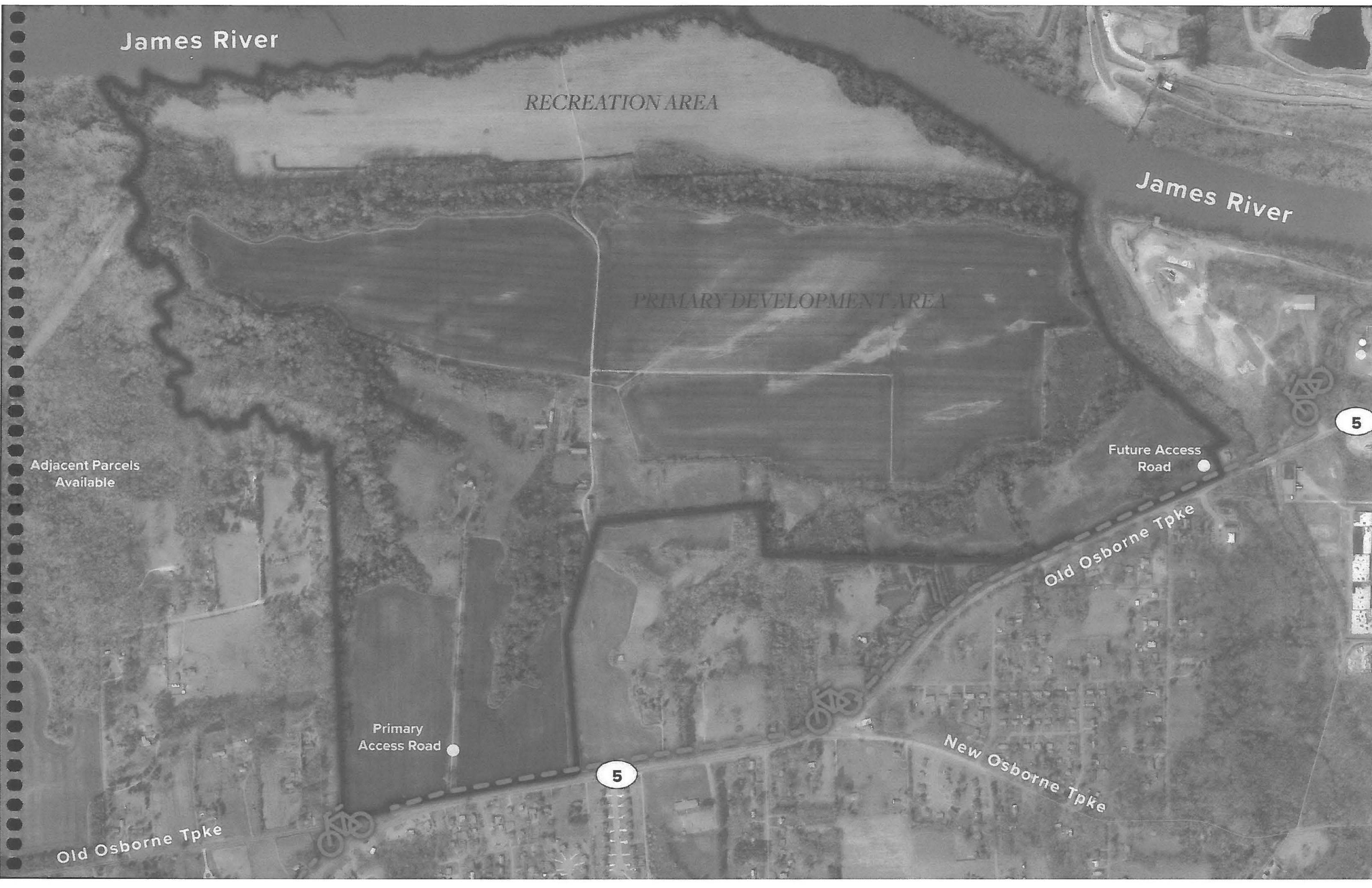
Primary
Access Road

New Osborne Tpke

Old Osborne Tpke

5


5



The Tree Hill Site has Three Distinctive Tiers.

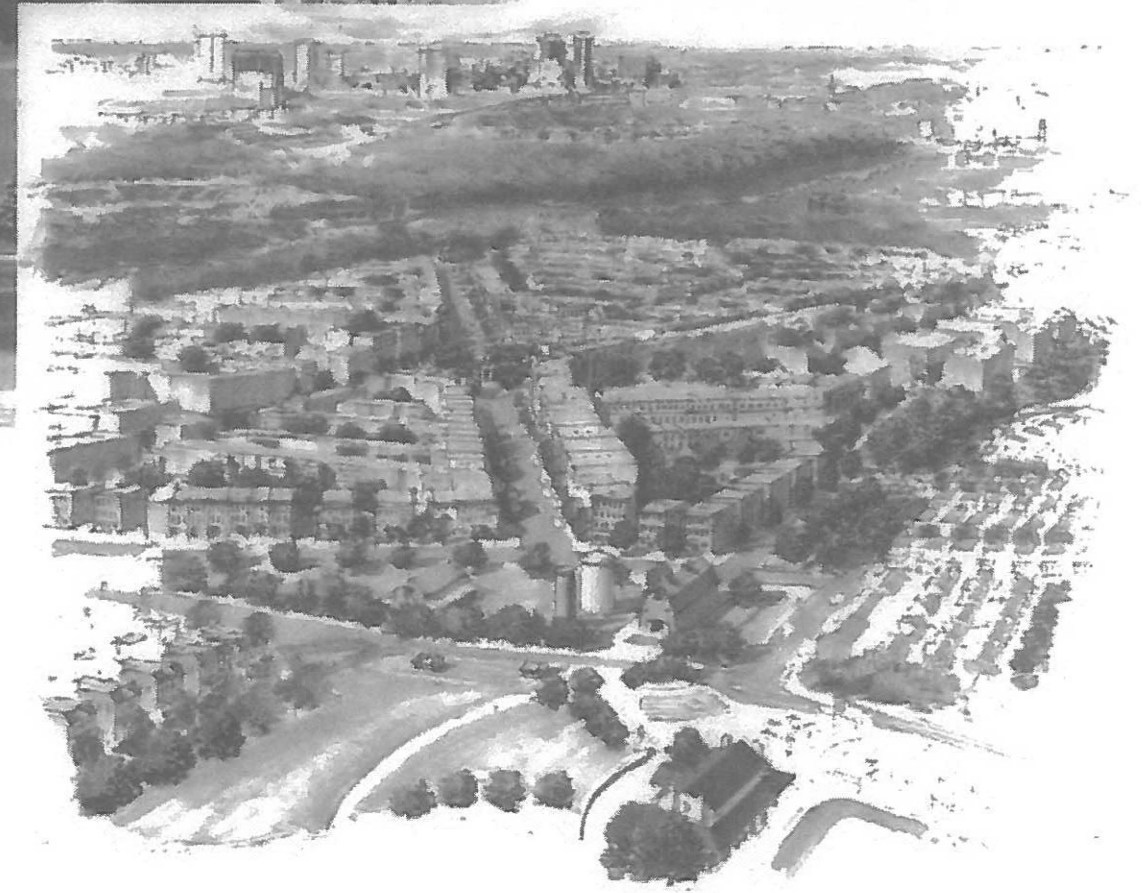
The Tree Hill House, which is on the National Register of Historic Places, dates to the 1770s and sits at an elevation of 150 feet above the James River. One hundred feet below the house is a 250-acre plain where we envision Amazon's campus with prime views of downtown Richmond and golden sunsets. There is also a 1920s vintage Dairy Barn which could be a perfect venue for a farmer's market or other suitable retail on this level of the property. With over 175 developable acres and the ability to grow vertically, this main development area is large enough to feature any number of office buildings, dog parks, coffee shops, apartments, or bike paths. The large expanse offers room for a sustainable urban street grid with 600-foot blocks, a new primary access road, and flexible development phasing opportunities while accommodating features such as bio-swales along wooded hedges, rain gardens, and sustainable landscaping with constructed wetlands and water features along the riverfront level.

The lowest tier—150 acres along the James River—is about 10 feet above the river. This level is within a flood plain and would be suitable for passive and active recreation activities such as an outdoor amphitheater, sports fields, trails, water sports, and even a commute-by-river option.



Tree Hill has a rich narrative bound up in the history of Varina, Henrico County, and Virginia, with a heritage spanning not only 400 years of New World and American history, but centuries of native culture before 1607.

It is believed this is the site of the meeting between Paramount Chief Powhatan, father of Pocahontas, and John Smith. As you will note in the potential site layout renderings, these areas can be preserved to commemorate their historical significance.



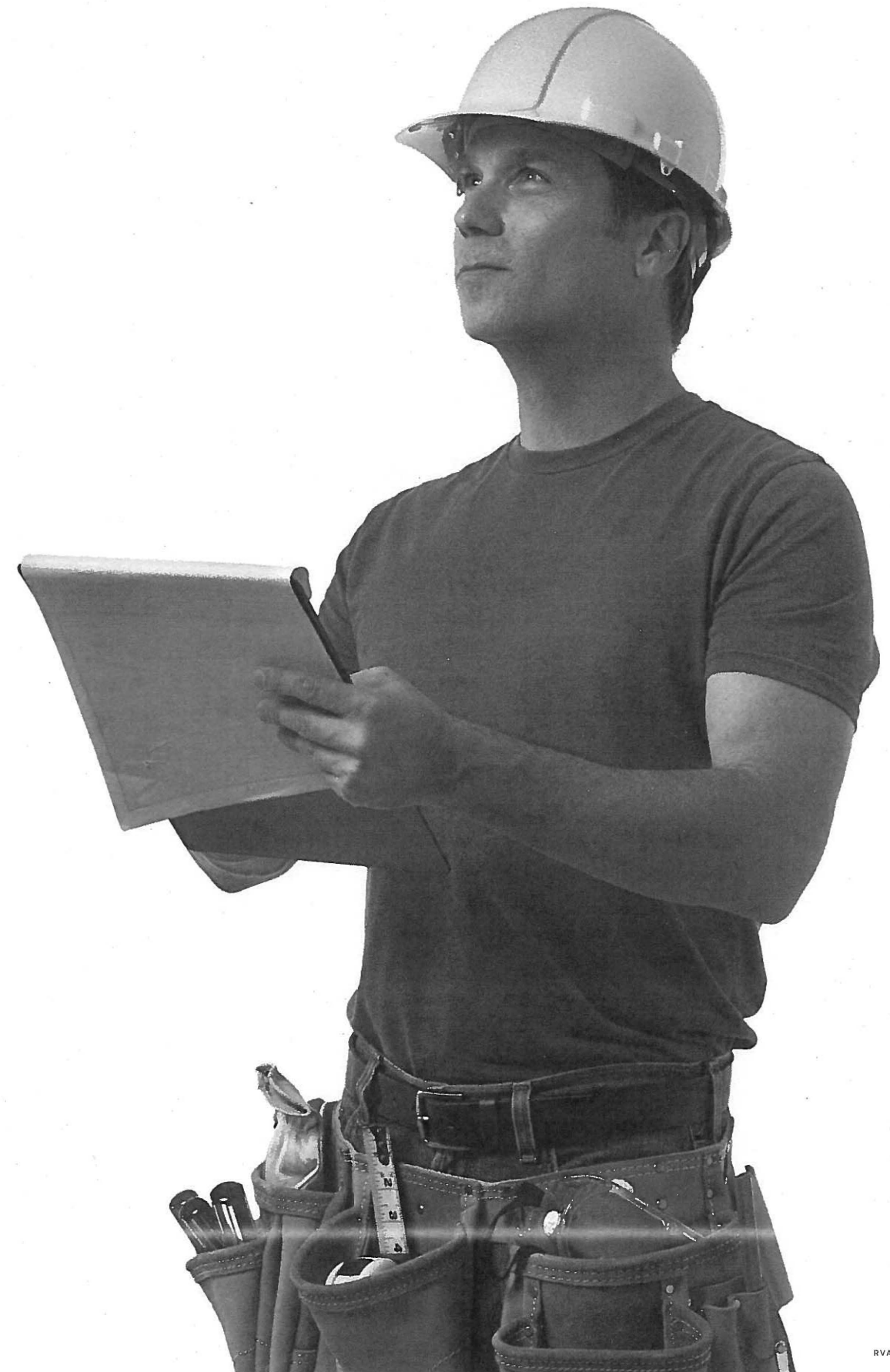
PROPOSED DEVELOPMENT

The Tree Hill property is owned by GrayCo. In 2007, GrayCo filed a plan of development with Henrico County for an urban mixed-use community consisting of 2,770 residential units, nearly 1.2 million square feet of commercial space, a 150-acre James River Nature area, and included anticipated civic amenities. [REDACTED]

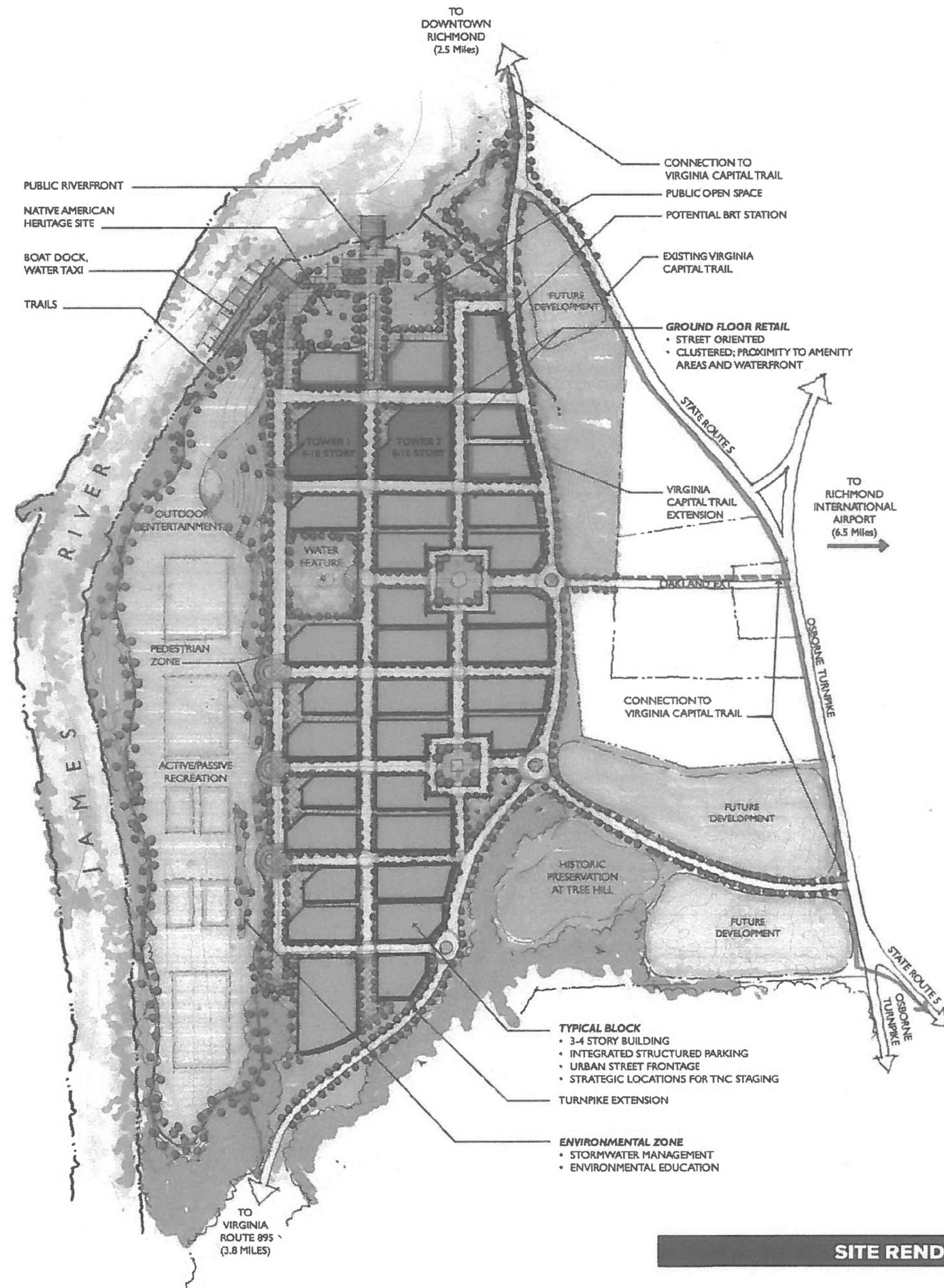
[REDACTED] This was master-planned by Duany Plater-Zyberk, world-renowned architects and town planners. Due to the recession in 2008, the plans were not executed. [REDACTED]

Because a plan of development was filed and approved for this site, the County has included Tree Hill in its future land use planning and has already outlined future infrastructure improvement plans to meet capacity needs for when the site is developed. The land is already zoned for urban mixed-use and the county manager and director of planning have expressed that the original Tree Hill Village plans could easily be adjusted to meet Amazon's headquarters needs as well as provide space for potential housing, commercial development, a hotel, and other opportunities on site.

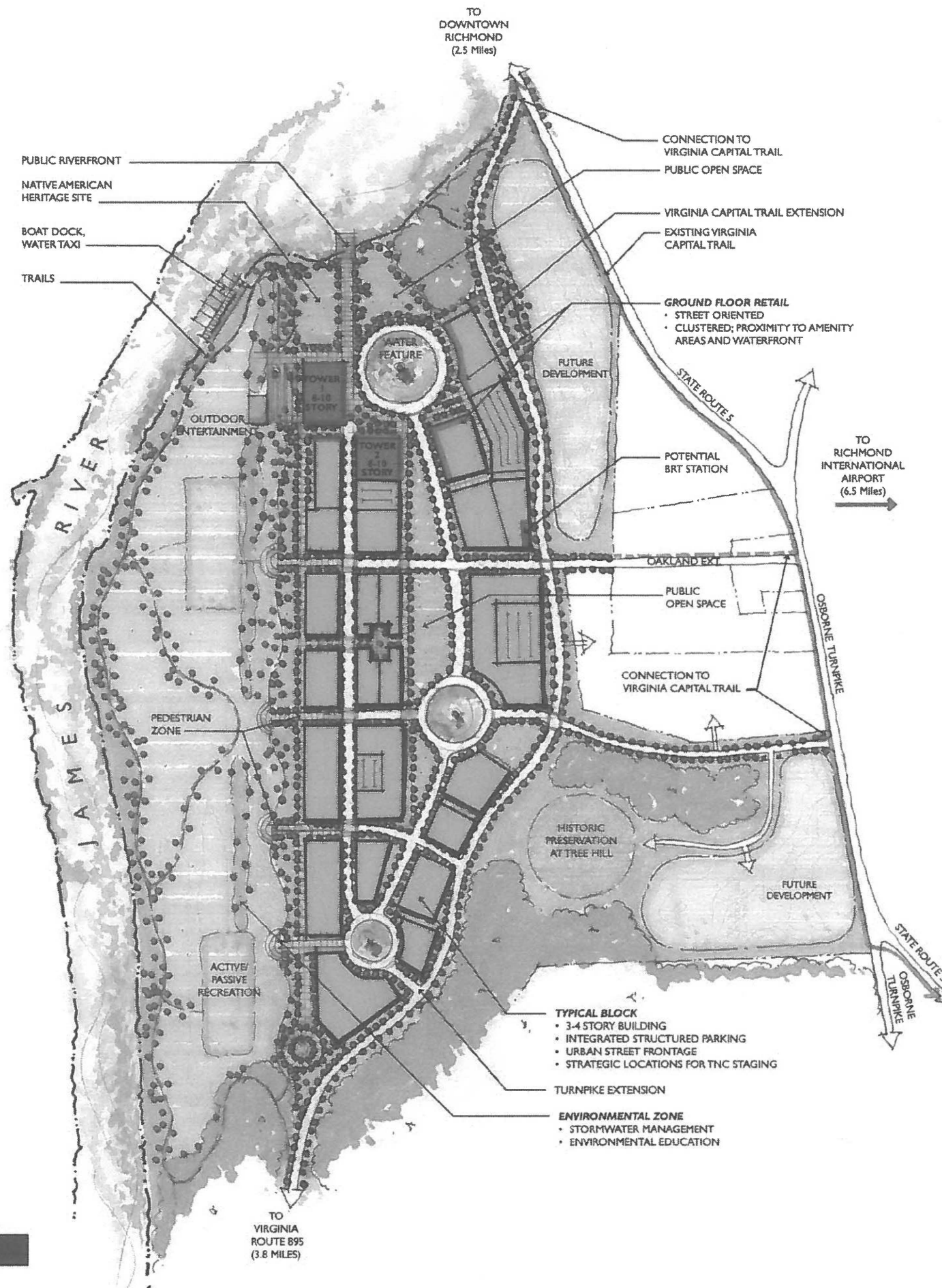
Two concepts for Tree Hill represent a unique opportunity for Amazon's future in innovation and growth. The site is positioned in a prime development region in Henrico's less developed East End – where the riverfront is targeted for future urban mixed-use development on adjacent, available land along the riverfront. This land is already properly zoned and can be developed as new neighborhoods and communities around Tree Hill.



Tree Hill Concept 1 is based on sustainable urban design. It features a 600-foot block urban street grid, providing flexibility in development phasing and the option for Amazon to partner with other developers to create a mixed-use community with its own character and sense of place. The concept includes offices, apartments, street-level retail, parks, and central community focal points. It also preserves sightlines of the downtown view while incorporating signature corporate towers. This urban concept offers the opportunity for Amazon to test future innovations at the site, whether it be intra-campus delivery robots, autonomous campus circulator transportation, or disguised data centers to heat the grid's buildings. With this urban structure, the site can capture and build on any of the city-grid features enjoyed in Seattle while creating a uniquely Amazon community along the James River.

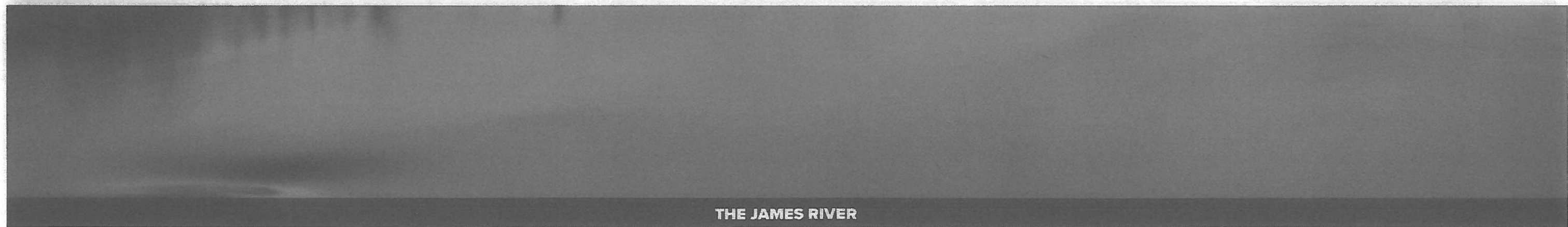
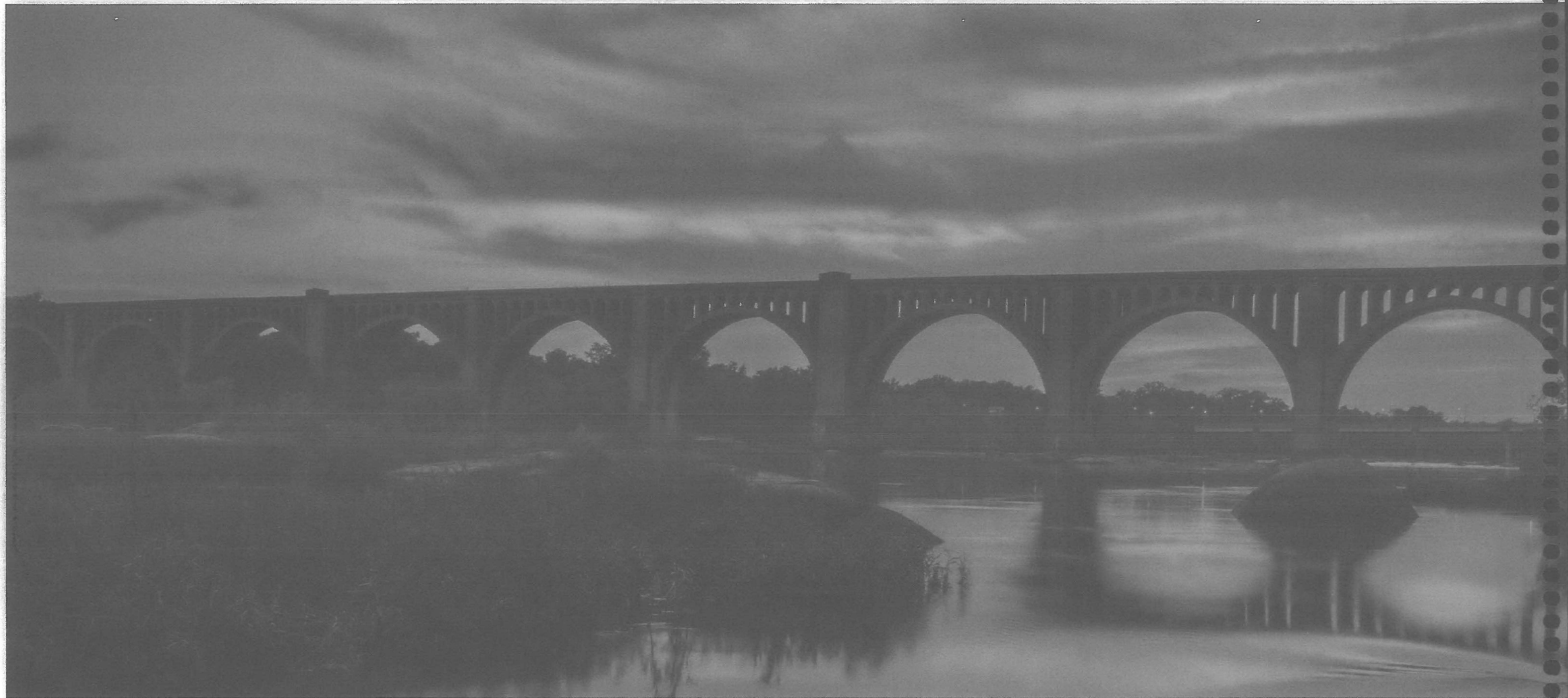


SITE RENDERING - CONCEPT 1

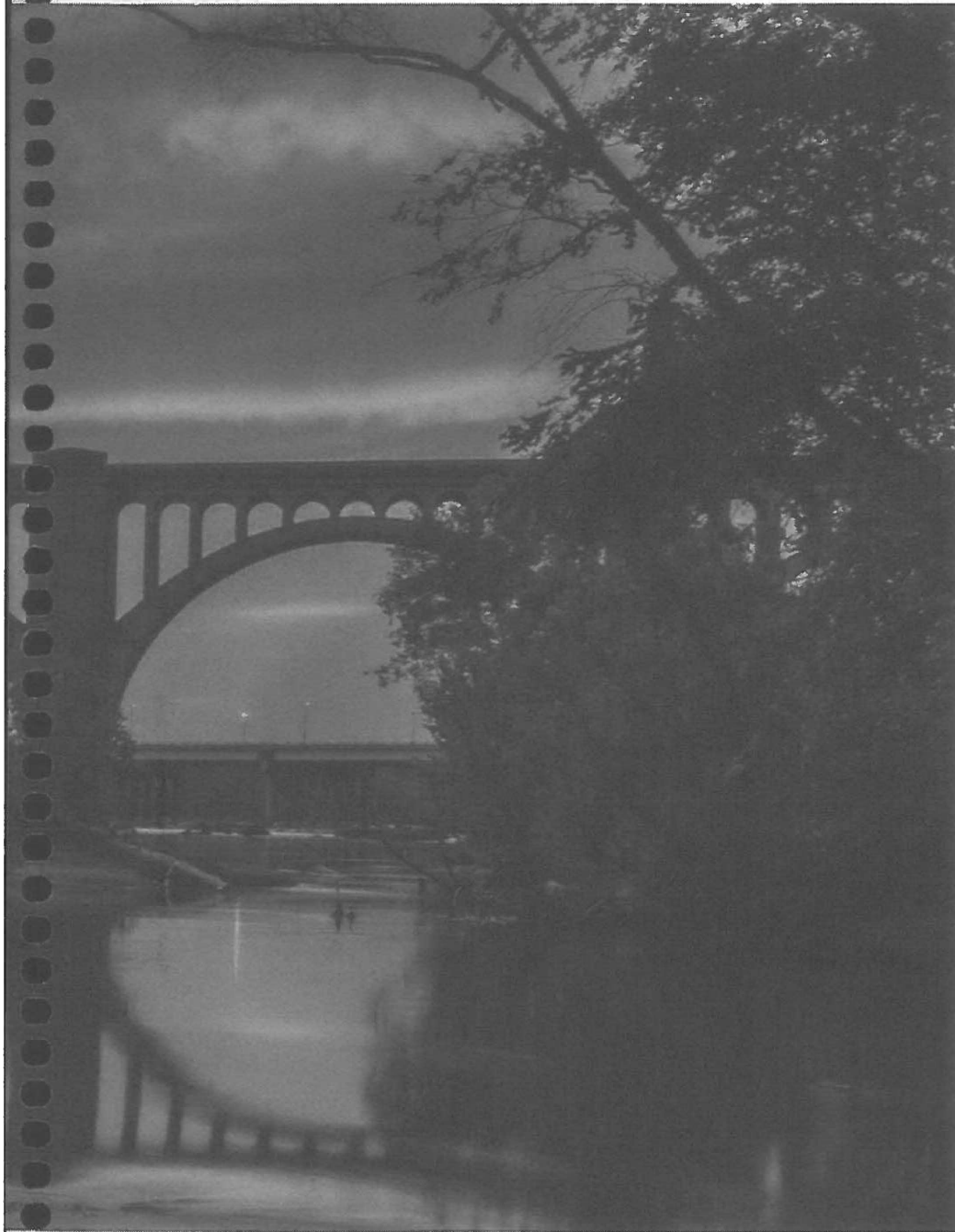


SITE RENDERING - CONCEPT 2

Concept 2 is a more suburban corporate campus, with a strong transportation network, prominent office buildings, and amenities amid landscaped boulevards and open space. This concept allows for buildings of various heights to showcase the Richmond skyline to the north and green space all along the James River. The campus concept allows Amazon additional site and traffic control and space for infill development.



THE JAMES RIVER



A Track Record for Speed to Construction

Henrico County takes pride in its ability to save companies time and money by providing them with the capability to have any necessary approvals expedited. For Amazon's HQ2 project, Henrico County would offer our Gold Fast-Track Approval Process, our fastest timeline for permitting.

Henrico County has a proven track record for providing the onsite permitting approach. The Henrico Building Inspections department set up an office in White Oak Technology Park when the Motorola-Siemens semiconductor plant was being built there to expedite the review and approval process for facility and utility construction. Plans were brought to the building official's trailer onsite for approval, and contractors returned to work immediately. The facility reached a milestone of "first tools" (tools installed and operational) in 11 months, setting a world record at the time. Technology Boulevard—a four-lane divided road, water/sewer lines, and a new sewer pumping station were also constructed in nine months in parallel with the plant construction.

More recently, the county was able to move Facebook's newly announced data center project from plan submission to permission for early land disturbance in eight weeks.

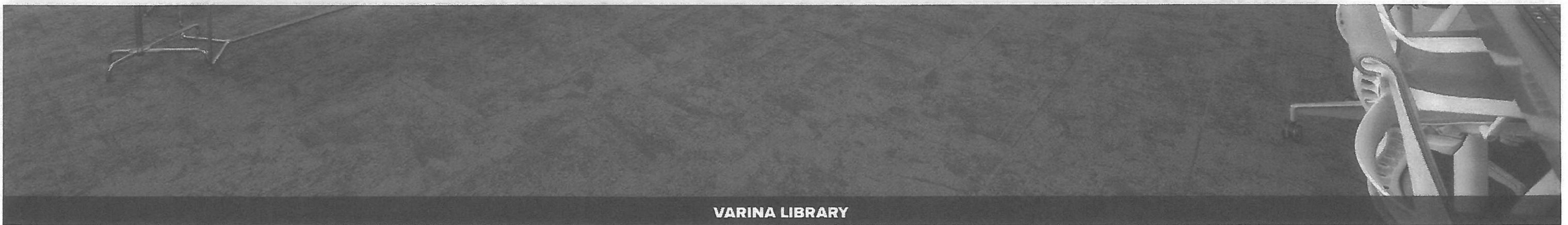
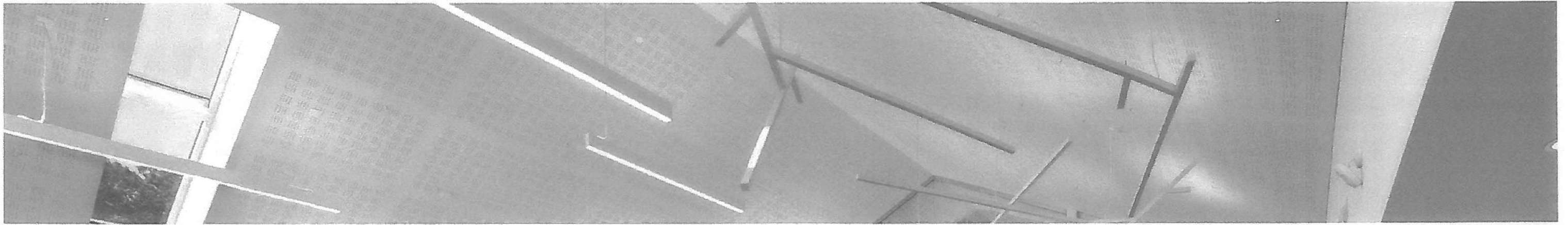
tree **HILL**
PROPOSED DEVELOPMENT

HENRICO'S COMMITMENT TO SUSTAINABILITY

The county manager is dedicated to sustainability within Henrico. To set an example for other developments and reduce environmental impact, all newly constructed county facilities must achieve LEED Silver certification or higher; 13 such facilities have been constructed since 2011.

The Henrico Department of Public Utilities is committed to pursuing water reuse and resource recovery opportunities at its Varina Water Reclamation Facility as economically viable opportunities present through its capital improvement planning process. Also, earlier this summer Henrico County began the final phase of major construction of a \$280 million reservoir project that when completed in 2022 will ensure adequate water supply for the County for the next 50 years.

Dominion, the electric provider for Tree Hill, is continuing to expand its renewable generating portfolio through a variety of creative partnerships and programs. Amazon could receive renewable energy from Dominion in a number of ways – delivered by Dominion via a third-party supplier, customer-owned solar distributed generation, dedicated or shared solar facilities, or by purchasing credits. As part of a new Dominion initiative, Facebook has committed to investing \$250 million in solar generation facilities to operate its new Henrico facility with up to 100% energy from renewable sources. Further, there are one approved and one proposed 20 MW solar generation facilities in Henrico, both within 10 miles of the Tree Hill site.



VARINA LIBRARY

ALL ROADS LEAD TO HENRICO

Henrico County has been a center for commerce and trade since 1611, when Jamestown settlers sent scouts upriver to establish what was then known as Henricus. The Tree Hill site is very well connected with multiple highway and main thoroughfares available to access the property. Henrico owns and maintains its own local road systems throughout its 244 square miles, which means that our citizens and businesses can expect responsiveness for road concerns. The Virginia Department of Transportation's Richmond Regional Transportation Planning Organization (RRTPO) Congestion Management Program (2016) shows no current bottlenecks in the area, which has led to the travel time index to be lower for this site than the region's index.

Diversity of access to site by road

1. VA-895/Pocahontas Pkwy – 5 min
2. Downtown Richmond via Route 5 – 8 min
3. I-95 – 8 min
4. I-295 – 9 min

Henrico County Public Works can complete necessary transportation improvements to meet increased traffic demand of the Amazon project in three phases. The proposed phases would be coordinated so as not to increase congestion during the process.

Currently the average commute time for Henrico workers is 21 minutes, with 74% of workers commuting to work in less than 25 minutes. Based on a previous Route 5 Corridor Study, with the previously approved Tree Hill Village and Wilton on the James development to the south of the site, we can expect traffic levels to remain acceptable through 2035 during peak commuting times in the morning (7-8 a.m.) and afternoon (5-6 p.m.) with these improvements.





URBAN MIXED-USE COMMUNITY CONSTRUCTED IN WESTERN HENRICO

In partnership with the GRTC transit system, Henrico and the project team are currently in the process of implementing a Bus Rapid Transit (BRT) route that will provide modern, high quality, high capacity rapid transit from western Henrico County directly through the City of Richmond to Rocketts Landing, only one mile away from the Tree Hill site on Route 5.

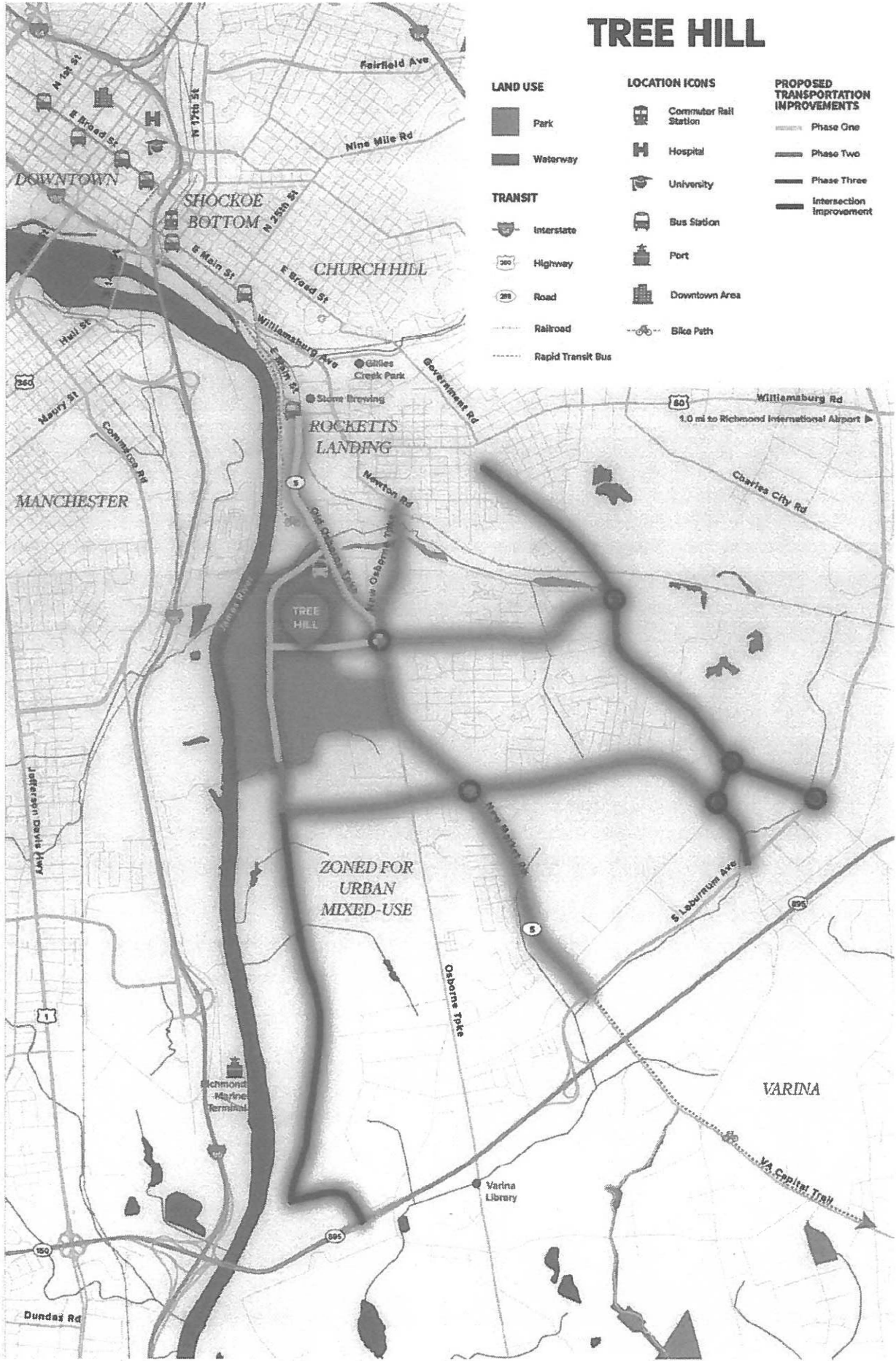
There has also been discussion of a potential water taxi system to connect Tree Hill with the up-and-coming Manchester neighborhood across the James River. Walking and biking options are also available to Amazonians via the 52-mile Capital Trail which starts at the Canal Walk in Downtown Richmond and follows Route 5 to the Tree Hill site. This bike route can easily be enhanced to provide direct access to the Amazon campus.

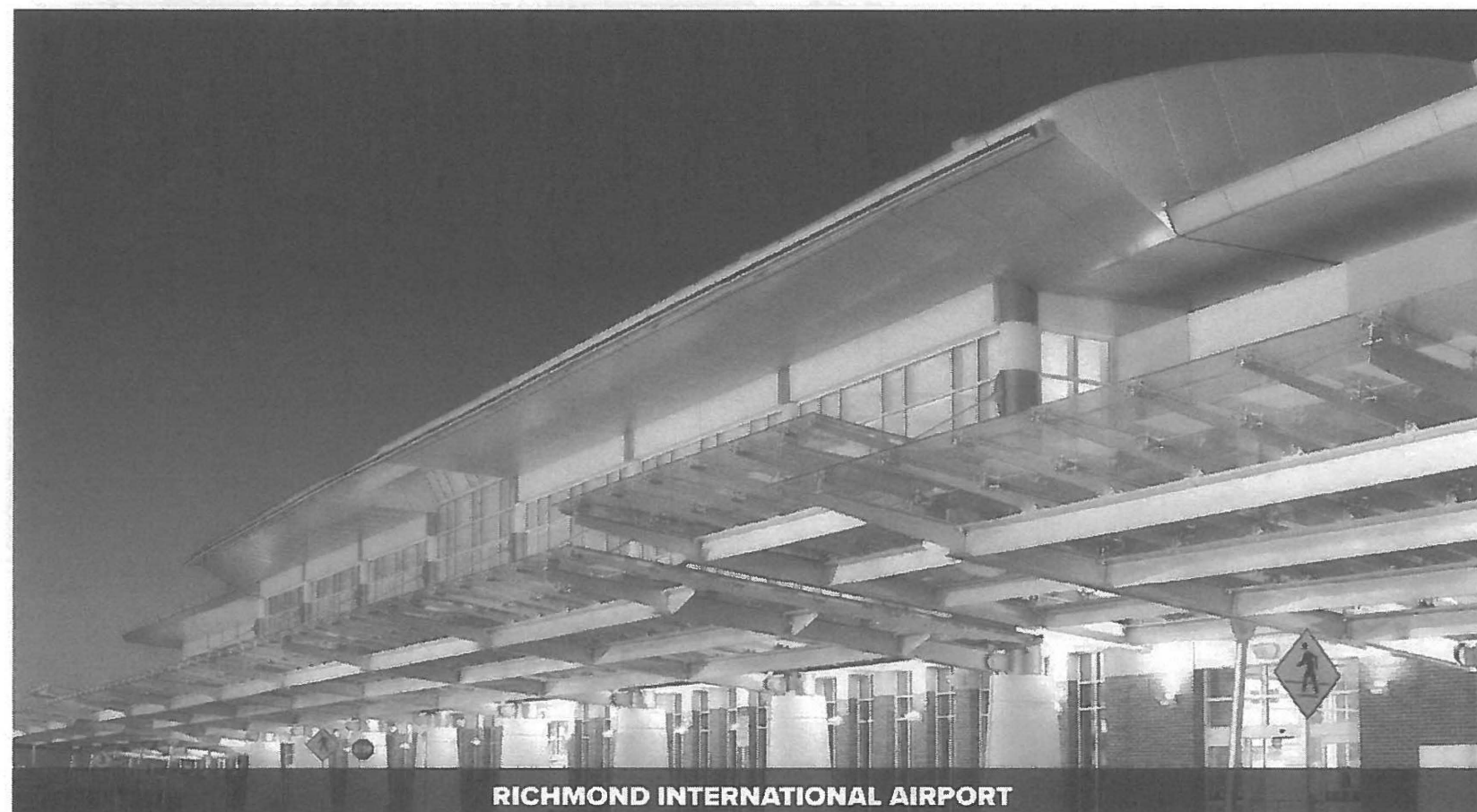
The Richmond Marine Terminal (RMT) is located just a few miles outside the Henrico border and provides direct barge service to the Port of Virginia's deep-water ports in Hampton Roads.

Henrico is also home to the Richmond International Airport (RIC). Washington Dulles International Airport (IAD) is little more than a two-hour drive and offers direct service to approximately 50 international destinations.

Proximity to international airports

- 1. Six miles to Richmond International Airport
- 2. 110 miles to Ronald Reagan Washington National Airport
- 3. 125 miles to Washington Dulles International Airport





RICHMOND INTERNATIONAL AIRPORT

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Natural Gas

The City of Richmond Department of Public Utilities is the natural gas provider for the site. Currently, a 12" steel IP line is in Osbourne Turnpike, adjacent to Tree Hill from New Market Road to Old Osbourne Turnpike. At the intersection with Old Osbourne Turnpike, the main becomes an eight inch IP line and continues as such back to Rocketts Landing and into the City. Capacity on the lines should be sufficient provided the gas load is in line with usage for office and retail space.

Telecommunications and Fiber

The Tree Hill area is served by four major cell phone carriers—Verizon, AT&T, Sprint, T-Mobile—and receives strong 4G service.

The closest fiber provider to the site is Lumos. That fiber can be extended to reach Tree Hill for approximately \$500,000 over approximately 1.1 miles.



HENRICO – STAY FOR LIFE

Tree Hill’s Proximity to Population and Labor Force

	5-Minute Drive	10-Minute Drive	20-Minute Drive
Total Population	28,010	129,641	654,934
Predicted 5-Year Pop. Growth	5.67	6.23	5.79
Urban Population	92.4%	93.8%	97.0%
Total Labor Force	15,190	69,247	351,045

Source: ESRI Business Analyst

Tree Hill’s Proximity to Existing Housing

	5-Minute Drive	10-Minute Drive	20-Minute Drive
Total Housing Units	5,089	22,418	183,437
Urban Housing	91.6%	94.4%	97.1%
Rural Housing	8.4%	5.6%	2.9%
Owner Occupied	64.9%	41.9%	45.1%
Renter Occupied	30.1%	45.8%	45.3%
Vacant Housing	5.0%	12.3%	9.6%
Median Home Value	\$190,448	\$185,339	\$183,191
Median Housing Income	\$64,771	\$47,866	\$45,195

Source: ESRI Business Analyst

Rocketts Landing – Continued expansion of the mixed-use riverfront development with 970 townhomes, condominiums, and apartments

Less than one mile from site, seven-minute bike ride on capital trail

The Villas at Rocketts Landing – The first solar community in Virginia, with 45 homes designed to be energy efficient and solar powered, at an affordable price

1.7 miles from site, four-minute drive, 10-minute bike ride on the Capital Trail

Castleton – Rural suburban development under construction near Dorey Park

5 miles from the site

The Ridings – Planned development of 420 suburban single family homes

7 miles from site

New Market Village – 168 single family homes and townhouses near Varina High School

3 miles from site, five-minute drive

Wilton on the James – Master planned 1,200-acre mixed use community along James River at I-895

Over 3,000 dwelling units, including townhomes, apartments, and single-family homes

4 miles from site, six-minute drive



ROCKETTS LANDING

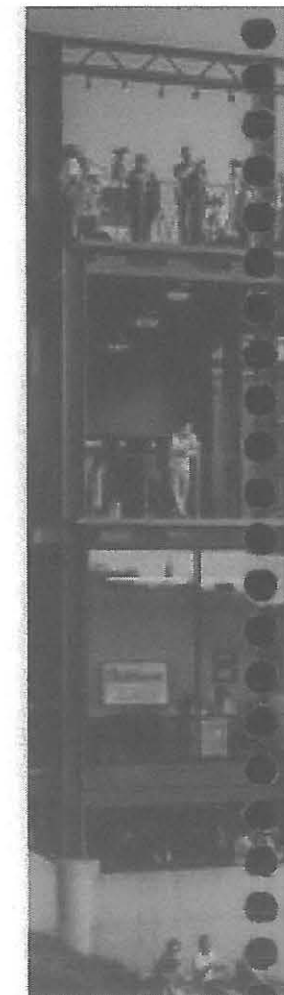


CASTLETON

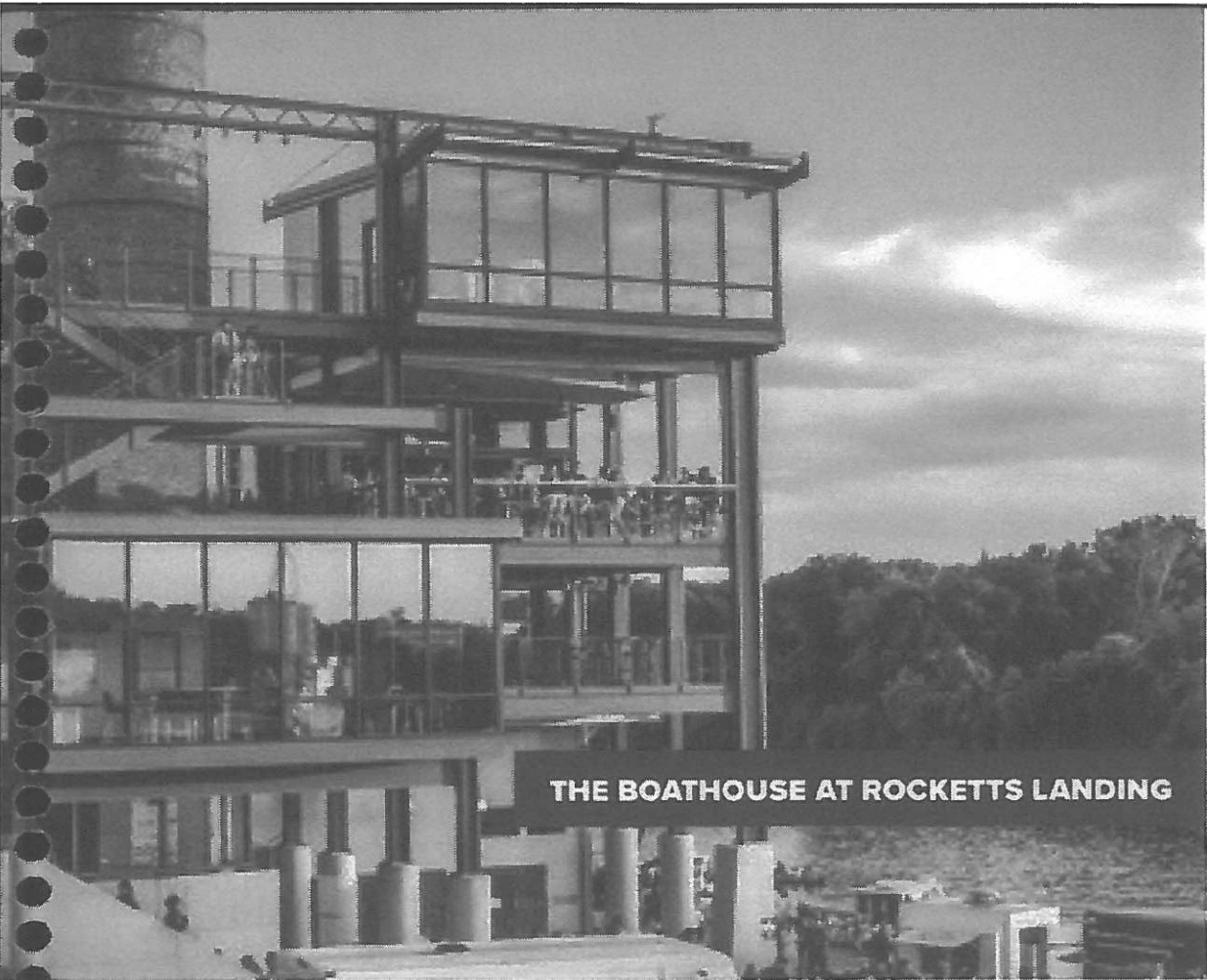


NEW MARKET VILLAGE

QUALITY OF WORK LIFE



JAMES RIVER



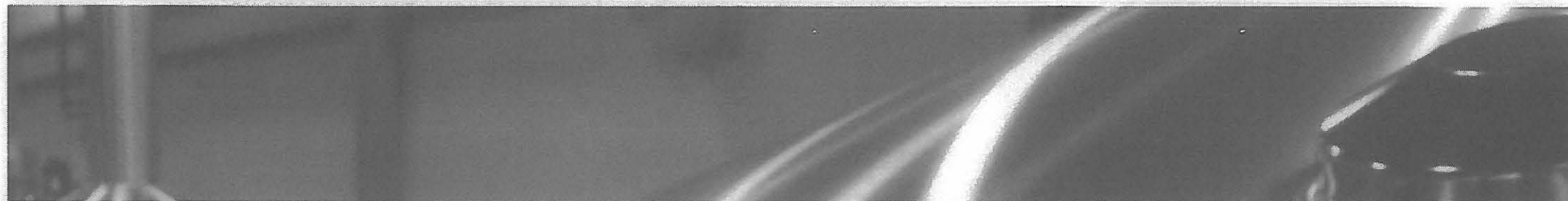
THE BOATHOUSE AT ROCKETTS LANDING

Proximity to Amenities	5-Minute Drive	10-Minute Drive
Shopping Center	0	1
Grocery Stores	0	45
Performing Arts	2	25
Spectator Sports	0	0
Museums	6	31
Amusement parks and Arcades	0	1
Other Amusement and Recreation	1	6
Fitness and Recreational Sports Centers	3	22
Full Service Restaurants	74	451
Specialty Food Stores	3	26
Historical Site	1	1
Zoo/Botanical Garden	0	0
Nature park	1	5
Hotels/B&B	2	51
Drinking Places	2	15
Personal Care Services	17	161

Source: ESRI Business Analyst



CHIMBORAZO PARK



STONE BREWING COMPANY JUST TWO MILES FROM THE SITE.

NEAR THE SITE

Capital Trail and Extension to Site - on Site

The Virginia Capital Trail is the product of a successful public-private partnership between the Virginia Department of Transportation (VDOT) and the Virginia Capital Trail Foundation (VCTF). The partnership exists to ensure the beautiful trail is maintained, enhanced, promoted, and continually developed, providing a safe and wonderful experience for all. The totality of the trail runs from Richmond to Williamsburg and is 52 miles long. The trail features numerous restaurants and lodging options along with many different museums and parks.

Rocketts Landing - Less than one mile

With a history that dates back to the Christopher Newport expedition down the James on the Godspeed, Rocketts Landing offers a unique set of amenities in the Richmond region. Built on the James River, visitors to the area can take advantage of 360 views of the class IV rapids while eating at some of the best restaurants in the area. These restaurants include The Boathouse and Conch Republic, which both

have seafood-inspired menus, as well as Urban Farmhouse, which is a farm-to-table concept that offers an array of different menu items.

Boaters can take their vessel out on the James River and tie up for the day or a few hours at the Rocketts Marina to grab a bite to eat or do some shopping.

Gillies Creek Park - Two miles

This 40-acre park is home to the only BMX race track in the area. Other amenities of the park include horseshoe pits and a hiking trail. Many social rec. teams host events at this park.

Stone Brewing - Two miles

One of the largest craft brewers in the country, Stone Brewing opened its East Coast brewery in Richmond. The facility will feature a brewery, Stone Brewing World Bistro & Gardens, and a company store. In total, the building is 220,000 sq. ft. They also hold many different events and festivals throughout the year like their annual Stone Throw Down, where the brewery brings in national bands and local food vendors for a day of enjoyment.

Church Hill - Three miles

From Patrick Henry's famous "Give me liberty or give me death speech" to being the birthplace of Douglas Wilder, the first African American governor of any state, Church Hill has a lot of history. To go along with that history, Church Hill has a huge food scene, so much so that the area was named one of the Top 10 "Hot Food Neighborhoods in the U.S." Restaurants in the area include Sub Rosa (highly acclaimed by *The New York Times*), Proper Pie Company, and the Roosevelt (named one of the South's Top 10 Bars *Southern Living*).

Downtown Richmond - Three miles

From boutique hotels to nationally-recognized restaurants, downtown Richmond has a lot to offer. Downtown has large hotel chains such as Marriott and Hilton but also boutique and historic hotels. The Historic Jefferson Hotel, which opened in 1895, houses a AAA "Five Diamond" restaurant called Lemaire, while the Quirk Hotel has been named one of the Top 60 best new hotels and resorts in the world and features a rooftop bar. The downtown area also offers many quick lunch options from the New

Secret Sandwich Society to River City Diner, a Richmond region institution since 1994.

Varina Library - Three miles

The new, 43,000 sq. ft. Varina Library opened in late 2016. Some of the amenities it offers are a digital media lab and a drive-up service window. The building is LEED-certified and received the prestigious AIA/ALA Library Building Award for 2017.

Dorey Park - Four miles

With 400 acres, Dorey Park can accommodate everything from recreation baseball leagues to horseback riding. Dorey also offers a one-acre off-the-leash dog park that is split for both small and large dogs. Also on premises are areas for catfish/trout fishing and an 18-hole disc golf course.

tree **HILL**
QUALITY OF WORK LIFE

APPENDICES



COMMONWEALTH of VIRGINIA

Office of the Governor

Terence R. McAuliffe
Governor

October 16, 2017

Mr. Jeff Bezos
Chief Executive Officer
Amazon
2121 7th Avenue
Seattle, WA 98121

Dear Mr. Bezos:

As Governor of the Commonwealth of Virginia, it is my distinct honor to propose Virginia as the future home of Amazon HQ2.

It has been exciting to see Amazon prosper in the Commonwealth, with the support of state, regional, and local partners with you every step of the way. The company has played a pivotal role in our efforts to diversify and build the new Virginia economy with steady growth in fulfillment operations, web services, data centers, and renewable energy deployment throughout the state. In fact, Virginia is now recognized as one of the leading states in the nation for renewable energy development and job creation related to that important and growing sector.

Amazon and Virginia have a lot in common. Your customers come first, and in Virginia, we put corporate partners first.

Your leaders are innovative, open to new ideas, always seek improvement, and demand exceptional talent. You know firsthand that the same is true in Virginia. The expansion of Amazon's footprint across the Commonwealth is a testament to our workforce and business climate. We are committed to offering the best technology talent and infrastructure in the nation, and will never stop striving for improvement.

Virginia has a world-class workforce that is due, in part, to our commitment to invest in workforce education and training. We want to ensure that Virginia businesses have access to a qualified, job-ready workforce. Since 2014, Virginia has increased the number of non-degree, industry-recognized credentials aligned with STEM-intensive occupations by 36%, and now awards more than 50,000 such credentials annually throughout the public workforce system. Virginia has the nation's highest concentration of workers in Computer and Mathematical

Patrick Henry Building • 1111 East Broad Street • Richmond, Virginia 23219
(804) 786-2211 • TTY (800) 828-1120
www.governor.virginia.gov

Mr. Jeff Bezos
October 16, 2017
Page 2

Occupations, a rank we expect to maintain through continued investment in response to the needs of business and industry.

While we pride ourselves on excellence, the cornerstone of Virginia's business reputation is integrity. You will not find a more loyal and trustworthy team to help your company navigate, and we will be your champion at every turn.

Amazon leaders possess strong judgment and good instincts, and so does Virginia. We know that HQ2 belongs in the Commonwealth, and we want to prove it to you.

The first English settlement in North America began in Virginia as a global business venture, and, more than 400 years later, the Commonwealth still represents the gateway for enterprise. We want Amazon HQ2 to become part of Virginia's rich history.

We look forward to hosting you in Virginia during the site selection process.

Sincerely,

Terence R. McAuliffe

United States Senate
WASHINGTON, DC 20510

October 18, 2017

Jeff Bezos
Chief Executive Officer
Amazon
2121 7th Avenue
Seattle, WA 98121

Dear Mr. Bezos:


As members of the United States Senate and as former Governors for the Commonwealth of Virginia, we add our support to every local, regional, and state official in assuring Amazon that Virginia is the best location for your next expansion - HQ2.

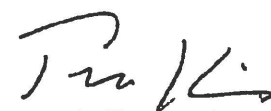
The Commonwealth has business success in its DNA. The success and diversity of companies that call Virginia home is a testament to what can be accomplished in the Commonwealth.

Virginia continues to play a critical and rapidly growing role in the technology industry. The Commonwealth has the second-highest concentration of tech workers in the nation. And with some of the world's leading research universities, Virginia is committed to providing Amazon with a talent pool that is consistently prepared for changing technologies, delivering a pipeline of skilled applicants for Amazon.

We want to work with Amazon to foster the innovation of technology companies in the U.S., starting right here in the Commonwealth of Virginia. Here in Virginia, we insist on high standards and think big, too. Let us show you what Virginia and Amazon can accomplish together.

Sincerely,


MARK R. WARNER
United States Senator


TIM KAINE
United States Senator

“Amazon leaders possess strong judgment and good instincts, and so does Virginia. We know that HQ2 belongs in the Commonwealth, and we want to prove it to you.”

Governor Terry McAuliffe



COMMONWEALTH of VIRGINIA

Office of the Lieutenant Governor

Ralph S. Northam
Lieutenant Governor

October 18, 2017

(804) 786-2078
Fax: (804) 786-7514
TTY/TDD: 1-800-528-1120
EMAIL: lgov@lgov.virginia.gov

Mr. Jeff Bezos
Chief Executive Officer
Amazon
2121 7th Avenue
Seattle, WA 98121

Dear Mr. Bezos:

As the Lieutenant Governor of the Commonwealth of Virginia and the Democratic nominee for Governor, I pledge my unwavering support for Amazon's growth in the Commonwealth.

Virginia is known for its bipartisan success in winning major projects, and both sides of the aisle agree: We want Amazon HQ2.

Companies continue to choose Virginia for its strategic Mid-Atlantic location that is within a one-day drive of approximately 43 percent of the U.S. population, with multiple national and international gateways. Add a pro-business environment underpinned by exceptional transportation and utility infrastructure, America's best public higher education system, a growing and highly talented workforce, and excellent quality of life, and the Commonwealth offers many critical location factors that corporate decision-makers are seeking.

I am committed to bolstering Virginia's centuries-old legacy by adapting business solutions, education, and skills training to provide a workforce and business climate geared to 21st century demands.

Through Virginia's submission for HQ2, we demonstrate that the Commonwealth is well-positioned to serve as a key base of operations. I have every confidence that Virginia will match Amazon's caliber by providing the highest standard of performance and innovation.

Thank you for considering the Commonwealth for Amazon HQ2. It would be a great privilege to host you in Virginia.

Sincerely,

Ralph Northam

Post Office Box 1195 • Richmond, Virginia 23218



EDFORVIRGINIA.COM

October 17, 2017

Mr. Jeff Bezos
Chief Executive Officer
Amazon
2121 7th Avenue
Seattle, WA 98121

Dear Mr. Bezos:

As the Republican nominee for Governor in the Commonwealth of Virginia, I want to make clear my support for Amazon to bring your second headquarters (HQ2) to Virginia.

In the Commonwealth, we have long-standing traditions of working across the aisle in a bipartisan manner for the greater good of our citizens. Should I have the opportunity to serve as Governor of Virginia, I will be a thoughtful, bipartisan leader committed to enacting policies that favor economic growth, job creation and prosperity for all Virginians.

Virginia is home to world-class universities and research centers. We are also home to a population that is talented, hardworking, and we are known for our signature warm hospitality. It is my hope that you will chose to call Virginia home to HQ2 and that you will partner with us in this exciting next phase of Amazon's growth.

If I am entrusted with the governorship, I commit to you that the Commonwealth of Virginia will be a partner to Amazon and looks forward to growing with you.

Sincerely,

Ed Gillespie

PAID FOR AND AUTHORIZED BY ED GILLESPIE FOR GOVERNOR



October 2, 2017

RE: HQ2

Dear Amazon executives,

On behalf of the governments we represent (the City of Richmond and the Counties of Chesterfield, Hanover and Henrico), we are writing in support of the Greater Richmond Partnership's bid for Amazon's HQ2 facility in the Richmond region of Virginia.

While most local governments are only concerned with their specific jurisdiction, you'll find that we have a cooperative, team spirit that guides us throughout all that we do. In fact, we work together in more than 100 ways – including economic development, tourism, transportation, education, public safety and much more. And from an economic development standpoint, we know that when a company selects a location within one of our borders, we all win.

Over the years, we've invested our time in building a great product for our economic development clients. This strategy has proven to be effective and is why eight Fortune 500 headquarters call the Richmond region home, ranking second for the total number of firms compared to peer cities. We have a diverse economy with top employers representing financial services, healthcare, retail, energy, distribution, and manufacturing industries.

As the capital of Virginia, Richmond has both local and state amenities which boost the region's attributes. And if you're looking for proximity to the nation's capital, it's only a short drive or train ride away.

Our economy is stable and our governments are highly rated with low debt service – all three counties have triple-AAA bond ratings and the City of Richmond is on a path toward AAA with their recent AA+ rating and a AAA factor assessment from Fitch Ratings. Simply put, the Richmond Region is a good investment. We accomplish more with less and insist on the highest standards.

We're ready to move mountains for Amazon to build its dream headquarters in RVA, so much so that our four governments have come together on this proposal on a plan to share any revenues on this project for the betterment of the entire region. This is only one of the many innovative ways we work together in the region.

Our team of battle-tested economic development professionals with experience in recruiting Fortune 1000 companies is here to provide guidance and insight for this transformative project. Please let us know how we can assist in your search.

Sincerely,

Mayor Levar M. Stoney
City of Richmond

Cecil R. Harris, Jr.
Hanover County Administrator

Joseph P. Casey, Ph.D.
Chesterfield County Administrator

John A. Vithoulkas
Henrico County Manager



Richmond Region Business Leadership

October 3, 2017

RE: HQ2

Dear Amazon Executives,

As the Richmond region's top business executives, we are writing in support of the Greater Richmond Partnership's bid for Amazon's HQ2 facility in Richmond, Virginia.

Richmond is large enough to meet your needs with more than 1.3 million people in the MSA, yet it's easy to engage here and make a major impact on the community. While we're not a major urban center, we also don't have high levels of congestion. In fact, Richmond is the least congested large city in the nation according to the Urban Mobility Scorecard, published by Texas A&M Transportation Institute and INRIX.

Richmond is an easy train ride away from Washington D.C. with a major cost differential – a cost of living of only 95 in Richmond compared to 148 in the D.C. metro. There are no two places so close in proximity yet so far apart in costs along the East Coast. When ICMA-RC opened its second location in Richmond recently, President & CEO Robert Schultze commented how the cost of doing business in Richmond is one-third the cost of its facility in D.C.

Richmond is the geographic center of the East Coast, making distribution and access to market easy. Perhaps that's why Amazon already operates four different facilities in Richmond. And it's definitely a reason why there are eight Fortune 500 companies that call the Richmond Region home.

Being located in Richmond, we've all found strong existing talent in the market as well as a very solid pipeline of future workers – both within the MSA and as a result of new residents locating in Richmond on a continual basis.

The workforce pipeline is primed by one of the largest colleges in the state: Virginia Commonwealth University. With 16,000 degrees conferred around the metro area annually – along with graduates from the University of Richmond, the University of Virginia, Virginia Tech, William & Mary, Virginia Union University, Virginia State University, James Madison University, J. Sargeant Reynolds Community College and John Tyler Community College, among others – the Millennial talent base is strengthened by the energy radiating from RVA's arts, culinary and craft beer scene. In fact, just this summer *Time Magazine* reported on research from the Urban Land Institute naming Richmond the second most popular urban area to which Millennials are moving.

We invite you to take a closer look at Richmond by short-listing our region and we look forward to having you join our community. Thank you for your consideration.

Sincerely,

The Undersigned Richmond Region Business Leaders



John Adams
Chairman Emeritus
The Martin Agency



Neil Amin
CEO
Shamin Hotels



Jon Ansell
CEO
Fusion



Toni Ardabell
CEO
Bon Secours Virginia



John Asbury
President & CEO
Union Bank



Ray Barnes
Regional President
– James River Region
BB&T



Marty Barrington
Chairman, CEO
& President
Altria



Victor Branch
Richmond Market
President,
Virginia Market Manager
Bank of America



John Burns
President & CEO
Westminster Canterbury



Gary Chadwick
Vice President
and General Manager
Kings Dominion



Ted Chandler
Co-Founder
and Managing Director
New Richmond Ventures



Lee Chapman
President & CEO
Davenport



Pat Collins
President Richmond
TowneBank



Bryan Cram
President,
Private Client Group
BB&T Scott & Stringfellow



Richard Cullen
Chairman
McGuire Woods



Tom Farrell
Chairman, President
and CEO
Dominion Energy



Rich Flaherty
President, US Division
Swedish Match



Wilson Flohr
President & CEO
Grow Capital Jobs



Andy Florance
CEO
CoStar Group



Moses Foster
President & CEO
West Cary Group



Woody Fowler
President & CEO
Williams Mullen



George Freeman
Chairman, President
and CEO
Universal Corporation

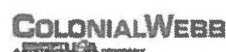


Tom Gayner
Co-Chief Executive Officer
Markel Corporation

Bill Goodwin
Chairman Emeritus
CCA Industries



Teddy Gottwald
Chairman
NewMarket Corporation



Mitch Haddon
President & CEO
Colonial Webb



Hiter Harris
Managing Director
Harris Williams



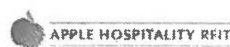
Katja Hill
Shareholder/Office Leader
LeClair Ryan



Mark Hourigan
President
Hourigan Construction



Ken Johnson
President & CEO
Johnson Inc.



Justin Knight
President & CEO
Apple Hospitality REIT



Hunter Lansing
President
Lansing Building Products



Gaylon Layfield
CEO
Xenith Bank



John Luke
Chairman
WestRock



John Martin
President & CEO
Southeastern Institute
of Research



Barry Matherly
President & CEO
Greater Richmond
Partnership



John Mathlesen
President & CEO
Capital Region Airport
Commission



Tom McInerney
President & CEO
Genworth



Tim McManus
President,
HCA Capital Division
Senior Executive,
HCA Virginia Health System



Bill Nash
President & CEO
CarMax



Taylor Negus
Partner
Aon Hewitt



Cody Phipps
President & CEO
Owens & Minor



Mike Rao
President
Virginia Commonwealth
University



Gary Rhodes
President
Reynolds Community
College



Stewart Roberson
Chairman, President,
and CEO
Moseley Architects



Bernard Robinson
President & CEO
Networking Technologies



Andrew Rose
President & CEO
Compare.com



Bob Seabolt
COO
Troutman Sanders



Kim Scheeler
President & CEO
ChamberRVA



Dan Schmitt
President & COO
HH Hunt



Chris Shockley
President & CEO
Virginia Credit Union

Bob Sledd
Managing Partner
Pinnacle Ventures, LLC



Dorinda Smith
President & CEO
SunTrust Mortgage



Ken Sullivan
President & CEO
Smithfield Foods



Carroll Swenson
Regional Managing Director,
Wealth Management and
Greater Richmond Market President
Wells Fargo



Bobby Ukrop
President & CEO
Ukrop's Homestyle Foods



Jim Ukrop
Co-Founder and Managing
Director
New Richmond Ventures



Lee Warfield
President & CEO
Cushman & Wakefield
Thalhimer



Mike Wassmer
President U.S. Card
Capital One



Jim Weinberg
President
Hirschler Fleischer



RICHMOND EXECUTIVE ROUNDTABLE

October 2, 2017

RE: HQ2

Dear Amazon executives,

As leaders of the Richmond region's non-profits, we are writing in support of the Greater Richmond Partnership's bid for Amazon's HQ2 facility in Richmond, Virginia.

When deciding to locate in a region, sometimes it can be hard to get plugged in and connected. That's not the case here in the Richmond Region. While the region has 1.3 million people, businesses here find it easy to engage with others and get involved in the community.

Finding a cause that is close to your heart is easy here. Our organization is a coordinated effort of civic-leaders from throughout the region for the purposes of idea sharing and working with business leaders to identify their interest areas for community engagement.

With eight Fortune 500 companies, you'll be in good company in the Richmond Region. In fact, our region has the second largest number of Fortune 500 companies for any mid-sized city in the country. Corporate social responsibility is a core theme throughout the region from Give-A-Day-RVA, an organized day of community service within the area, to serving on boards or investing time into a variety of causes – whether it's mentoring kids and serving in youth programs, sustainability, arts and culture or beyond.

You'll find this is a community that truly cares. We sincerely hope that you'll consider Richmond as the location for HQ2. And should you do so, we look forward to working closely together.

Sincerely,

Kim Scheeler
Chair, Executive Roundtable
President & CEO, ChamberRVA

Enclosure



Barry I. Matherly
President and CEO
Greater Richmond
Partnership



Lisa Sims
Executive Director
Venture Richmond



Kim Scheeler
President and CEO
ChamberRVA



Ashley Hall
Manager
Capital Region
Collaborative



John F. Berry, Jr.
President & CEO
Richmond Region Tourism



Susan B. Horne
President & CEO
LEAD VIRGINIA



Jon E. Mathiasen, A.A.E.
President & CEO
Capital Region Airport
Commission



Daniel L. Plaucher
Executive Director
Virginians for High
Speed Rail



David Green
CEO
GRTC Transit System



Carrie Roth
President and CEO
Virginia Biotechnology
Research Park



Joi Dean
Chief Executive Officer
Richmond Metropolitan
Transportation Authority



Martha Shickle
Executive Director
Richmond Regional
Planning District
Commission



Robby Demeria
Executive Director
RichTech, Richmond's
Technology Council



Michel Zajur
President & CEO
Virginia Hispanic
Chamber of Commerce



Laura Lafayette
CEO
Richmond Association
of REALTORS



Jon Lugbill
Executive Director
Sports Backers



Bill Martin
Director
The Valentine



Sherrie Brach Armstrong
President & CEO
The Community
Foundation



Douglas H. Pick
President and CEO
FeedMore



Kimberly A. Hynes
Executive Director
Central Virginia
Waste Management



the
YMCA OF
GREATER
RICHMOND

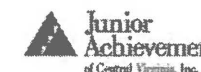
Tim Joyce
President and CEO
YMCA of Greater Richmond



Reginald E. Gordon, Esq.
Director
Office of Community
Wealth Building



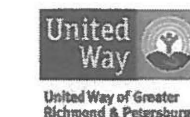
TK Somananth
CEO
Richmond Redevelopment
& Housing Authority



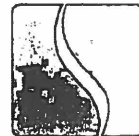
Daphne Swanson
President
Junior Achievement
of Central Virginia



Nancy Thomas
President and CEO
Retail Merchants
Association



James L. M. Taylor
President and CEO
United Way of Greater
Richmond and Petersburg



SHAMIN
HOTELS

October 5, 2017

Amazon

Office of Economic Development c/o Site Manager Golden

2121 7th Ave
Seattle, WA 98121

Dear Amazon Economic Development Team,

As a lifelong resident of the Richmond Region, a diverse, dynamic, accessible, affordable and welcoming community that continues to garner "best-of" accolades, I couldn't be more excited that Richmond is submitting a proposal for consideration as home to Amazon's HQ2.

We understand how important travel-related requirements are to your consideration of a new home for HQ2, and we are prepared to check off all the boxes on your list. Understandably, guaranteed access to hotel rooms for Amazon employees, partners and other corporate guests is a top priority.

I am writing this letter to serve as a firm guarantee that Shamin Hotels will develop a dedicated hotel of sufficient size, scope and service level in order to meet your future lodging needs in the Richmond metro area. Depending on the site, should you choose the Richmond region, the hotel could even be located on your headquarters campus.

I believe that our goals and corporate culture at Shamin Hotels closely mirror those of Amazon, with a dedication to exceptional customer service, a laser focus on operational excellence, and a commitment to sustainability and energy conservation. In Richmond alone, we have excellent examples of historic redevelopment resulting in exceptional, modern hotel properties. Recent examples include our downtown Hampton Inn and Homewood Suites dual-branded hotel with a rooftop bar located in a historic, redeveloped office building, a new construction Westin hotel and the Richmond Moxy Hotel, currently under development in a historic building, and slated to open in early 2018.

Shamin owns and manages more than 50 properties (in four states), with more than 6000 rooms and over 100,000 square feet of meeting / banquet space. Our organization is recognized as the largest private hotel owner in the State of Virginia. Our ability to maintain long-standing relationships with the industry's most recognized hotel brands has rewarded us with loyalty from our guests, and recognition from our franchisers.

We hope you will discover what those of us who are fortunate enough to live here love so much about the Richmond region. We thank you in advance for your consideration of the Richmond region as your new Amazon HQ2 hometown. Please feel free to contact me directly if you would like to discuss hotel requirements and options in more detail.

Sincerely,

Neil Amin
President and CEO



804.288.0011
FAX 804.288.6435

Executive Offices • 4901 Libbie Mill East Blvd, Suite 200 • Richmond, VA 23230

October 11, 2017

Dear Marissa –

Thank you for reaching out to us for assistance on the Amazon HQ2 Project. This provides the Richmond area an opportunity to showcase how wonderful our region is to one of the most prolific companies in the Country and we are grateful that the GRP thought of Gumenick Properties as a helpful resource.

We contacted several of newest homeowners, and have quoted them below, who selected Richmond as their new home town over other cities on the East Coast and asked them to explain what made Richmond their final choice.

One of the things that many of us in Richmond take for granted is our ease of mobility throughout the region. "Everything is within an easy drive, with no commuter hassles, even at the airport," mentioned one of our home owners at Grayson Hill. A Monument Square resident mentioned "Great roads to run/bike and very easy to navigate the city without traffic headaches."

What good is ease of accessibility in a region if there is nothing to do? Fortunately, that is not the case in RVA. The region has recently made its mark nationally as a foodie "hot-spot". The "dining is fabulous," but paired with "Richmond Ballet, the Altria Theater, and the Richmond Forum" a night out can include much more entertainment than just a great meal. In addition to the abundant cultural arts options, the numerous museums can offer plenty of educational experiences for all interests. "The Virginia Museum of Fine Arts is world class."

We are also fortunate that several universities call the region home. The universities offer cultural experiences, educational, research, and sporting opportunities. Virginia Commonwealth's MCV medical hospital offers cutting edge treatment and care for the region. VCU is also home to one of the nation's top "brand centers" creating a creative class in our city that is second to none.

In addition to an abundance of culture, history, educational opportunities the park system offers something for everyone. The adventure seeker can ride class IV and V rapids in the James River without ever leaving the city limits. There are miles of trails along the park system for running, mountain biking or hiking. But if there is a preference for something less extreme the many urban and suburban parks in the area offer something for everyone. If the abundance of activities available locally are not enough, the region itself is "perfectly situated between the ocean and the mountains" and less than a two-hour drive from Washington D.C. If someone is claims to be bored in our region, they simply aren't trying at all.

Coupled with the many choices available for dining, outdoor activities, education and entertaining ourselves in RVA is our diversity in housing availability. We hear from many of our customers that they are "surprised by the housing market and the affordability and variety" of housing offered. If someone is looking to live in the city, condos and apartments are available in the downtown area. The Fan and Museum District offer urban living in historical row houses. The suburban areas offer the complete spectrum of housing opportunities to meet the needs of every lifestyle. The affordability of the housing market cannot be understated, the purchase price is one aspect of its affordability but the cost of owning a home here is very competitive. As one of our customers put it, "You get the complete package without having to put a huge dent on a person's housing budget."

Our homeowners summarize it best, "we felt the warmth and connection when we decided to relocate to Richmond. We chose purposefully, Richmond is a vibrant and inclusive community." Another resident of Monument Square wrote that, "Moving to Richmond has really been a win/win situation, personally, professionally and financially." Richmond truly "has a small town feel with so much to offer." "Why would anyone want to live anywhere else?"

Sincerely,
Shane Finnegan
VP – Construction and Development
Gumenick Properties

WHO WE ARE

The Greater Washington Partnership is a first-of-its-kind civic alliance of CEOs in the region drawing from the leading employers and entrepreneurs committed to making the Capital Region of Baltimore, Washington, and Richmond one of the world's best places to live, work and build a business. Employing nearly 200,000 people across the region, we leverage our CEOs and their organizations' capabilities, resources, and influence in service of the public interest. The Partnership's formation in late 2016 – with the support of the political leadership of Maryland, Virginia, and the District of Columbia – comes from a recognition that the CEOs of the leading employers need to consistently be at the table, working together to help break down the barriers that hold back solutions. We are committed to the region for the long-term, fostering unity and advancing growth to ensure that we achieve our full potential. The Partnership will drive two foundational outcomes for the region – improving the region's transportation system and enhancing our region's ability to develop, attract and retain the talent our region's businesses need.

The CEOs that make up our organization span the geography of our region, employ nearly 200,000 people in the region, and represent a wide range of innovative organizations across industries, including Capital One, Northrop Grumman, Under Armour, and Dominion Energy. The full list of our Board Members is included at the end of this document.

We look forward to partnering with Amazon to make your expansion in the Capital Region a success.

Our Vision

By working together ...

We will leverage our unique strengths, our diversity and the power of commerce to help make the 'Capital Region' of Baltimore, Washington, and Richmond...

- ... a dynamic and inventive business environment with a purpose driven community
- ... a home for those seeking opportunity to fulfill their aspirations and thrive
- ... an economic power house that attracts the creatives, entrepreneurs, technologists and people who dream big
- ... a place with the transportation, housing, education, and healthcare systems designed and shaped for the 21st century
- ... a global magnet for talent and innovation

Establishing Baltimore, Washington, and Richmond as the model for a thriving super-region.

OUR REGION

The Capital Region of Baltimore, Washington, and Richmond is the third largest U.S. regional economy and seventh largest in the world with more than 10 million residents and over \$650 billion in annual gross regional product. With unparalleled strengths and assets – our highly educated, diverse and talented people, our world-class universities and federal research facilities, our global connectedness through our airports, ports, embassies, and digital infrastructure, and our unique position as home to the U.S. federal government – the Capital Region provides an unmatched opportunity for Amazon's second headquarters facility, accessing the best of an increasingly interconnected super-region.

The world's most educated, talented, and diverse workforce. Our region has always been a magnet for those seeking to solve the world's most complicated and impactful problems, from technologists seeking to put a man on the moon or sequence the human genome, to visionaries attempting to make our country and our world more secure and more just. With a workforce of 6.7 million spanning from Baltimore to Richmond, our region offers the deepest, most diverse, most highly educated workforce of any region in North America. 46 percent of the region's working age adults have at least a bachelor's degree, more than any other region in the U.S. We rank second amongst U.S. regions for STEM workers in computer and mathematical fields and tech oriented degrees and certificates. We have a significantly more diverse workforce than the U.S. average, and there are more than 184 languages spoken across the region. And with nearly one million students enrolled in the more than 100 higher education institutions across the region, graduating 256,000 each year, our talent pipeline is unmatched.

The world's leading technology, research, and ideas hub. Our region has long been the home to some of the world's leading scientific and academic research, developing and translating technologies that have driven the global economy's growth for decades. We have 115 federal labs and federally-funded research institutions, providing global leadership in a range of potential breakthrough areas from precision medicine to applied physics to advanced materials to digital security. And in a world where technology, markets, and governance are increasingly intertwined, locating business decision-making, product development, and commercial operations in a region fluent in the worlds of both business and policy can spur innovation and more effectively unlock opportunity that benefits all.

The world's global gateway. Since the founding of the United States, the Capital Region has grown in its global influence and connectedness. A home in our region puts you at the center of the most connected place, anywhere in the world: more than 175 embassies providing immediate access to leaders and governments in every major country; four international airports (Washington Dulles, BWI Marshall, Reagan National, and Richmond International) providing direct connectivity to every major domestic and international destination; the Ports of Virginia and Baltimore at the southern and northern edges of our region providing global freight connectivity; and the densest intersection of fiber networks anywhere in the world.

GREATER WASHINGTON PARTNERSHIP'S COMMITMENT TO AMAZON

The formation of the Partnership is a demonstration of the commitment that our region's leading employers and entrepreneurs have to the long-term health and vitality of the Capital Region. Our long-term perspective will help to define our region's agenda – cutting across political cycles and party lines – and our near-term urgency and fact-based approach will unlock solutions to the issues most important to our region's competitiveness and prospective employers.

Fostering Unity

Our commitment is real. By fostering unity across the business, government, academic, and philanthropic sectors, we can enable the ongoing collaboration needed to drive solutions that cut across our region geographic and political boundaries. We know what our region has to offer, and we know that with the consistent participation and engagement of CEOs representing employers in the region we can shape the best place in the world to live, work, and build a business.

Our Priorities

Regional Mobility: A region's transportation is central to quality of life, attracting and retaining a world-leading workforce, and driving inclusive growth. The Capital Region brings deep investments and strong underlying transportation assets, but we recognize that more needs to be done to fully harness the agglomeration benefits of our emerging super-region, and address the challenges that accompany growth. The Partnership is committed to developing, advocating for, and executing a range of solutions focused around four primary outcomes:

- Connecting the super-region: We must connect our major activity centers through fast, reliable, and diverse transportation options, beginning with world-class connectivity between the business centers in Washington, Baltimore, and Richmond;
- Improving the consumer experience: Travel to and from daily destinations should be seamless and reliable across a network of transportation options cutting across our region's jurisdictional boundaries;
- Ensuring equitable access: Every resident of our region – regardless of his or her community – should have affordable transportation access to employment and educational opportunities, enabling economic mobility and opportunity;
- Integrating innovation: With our size and diverse population, the Capital Region can lead the nation in providing new mobility options to its residents and businesses by incentivizing and enabling the consistent, seamless, and rapid adoption of transformative innovations.

Tech Talent: Our region's human capital is its greatest asset, with high educational attainment levels and a robust university and educational system. Nevertheless, with rapid evolution of technologies and an increasing reliance on knowledge workers, we recognize that employers and education providers must work more closely and more nimbly than ever to ensure we remain a premier source and destination for talent, and one that is highly responsive to the needs of its employers. To that end, the Capital Region is building on its many areas of strength, including its global leadership in secure information technology. Today, the region produces more than 2.5

times the number of graduates prepared for careers in information security than any other region in the country. As security becomes a central feature in all products being developed and commercialized, our employers and education providers are taking deliberate actions – including scaling programs in elementary, secondary and post-secondary education, and supporting the attainment of new skills and experience across our existing workforce – to position our region as a hub for the next generation of technology development. Developing needed responsiveness into our region's ability to develop, attract, and retain tech-oriented talent will ensure that we have the workforce needed to enable employers to meet their rapidly evolving needs.

Our Commitment to Your Success

Your decision will have a powerful impact on our region's trajectory – with it brings phenomenal new opportunities and real challenges that together we will confront. Our organization is committed to the long-term health and vitality of this region, driving the solutions growing businesses need to operate, hire, and thrive in this region.

You have our collective commitment to make your entry and growth in the Capital Region a success, and as part of that, a standing invitation to join the Greater Washington Partnership. Together, as part of the region's leading employers, we will ensure that the Capital Region reaches its enormous potential.

GREATER WASHINGTON PARTNERSHIP – BOARD OF DIRECTORS

Russ Ramsey, <i>Chair</i> CEO Ramsey Asset Management	Ted Leonsis, <i>Vice-Chair</i> Founder, Majority Owner, Chairman, and CEO Monumental Sports & Entertainment	Peter Scher, <i>Vice-Chair</i> Chairman of the Washington, D.C. Region JPMorgan Chase & Co.
Wes Bush Chairman, CEO, and President Northrop Grumman Corporation	Chris Crane President and CEO Exelon Corporation	Ron Daniels President Johns Hopkins University
Rich Fairbank Founder, Chairman, and CEO Capital One	Tom Farrell Chairman, President, and CEO Dominion Energy	Bahija Jallal Head of MedImmune and Executive VP, AstraZeneca AstraZeneca MedImmune
Sheila Johnson Founder and CEO Salamander Hotels & Resorts	Sachiko Kuno President and CEO S&R Foundation	Luis Moreno* President Inter-American Development Bank *Honorary Advisory Member
Terry McCallister Chairman and CEO Washington Gas	Kevin Plank Founder and CEO Under Armour	Tony Pierce Partner Akin Gump Strauss Hauer and Feld LLP
David Rubenstein Co-Founder and Co-CEO The Carlyle Group	Scott Rutherford Senior Partner, Washington, D.C. McKinsey & Company	Ken Samet President and CEO MedStar Health
Bill Stromberg President and CEO T. Rowe Price	Grant Verstandig Founder and CEO Rally Health	Mark Weinberger Global Chairman and CEO EY

END NOTES

Talent

37% of the population has a bachelor's degree or higher: U.S. Census Bureau, 2016 American Community Survey

Virginia and Greater Richmond already have a large pool of workers: Bureau of Labor, Occupational Employment Statistics 2016

Single-highest concentration of technology talent: Bureau of Labor Statistics, Occupational Employment Statistics, 2016

Best public higher education system: SmartAsset (March 2017), "The Best States for Higher Education in 2017"

Three of the country's top 25 public universities: George Mason University School of Public Policy (April 2014), "Growing Up and Aging in Place: Generational Demographics in the Washington, D.C. Region"

Virginia's higher education system is top 10: U.S. News & World Report Rankings (2017), "Top Public Schools 2018"

Sixth-best U.S. state in education: Wallethub (2017)

Virginia's 72 four-year colleges and universities educate ~500,000 students: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2014-2015

Virginia produces a massive number of graduates...: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2015

Greater Richmond's portion of that talent pipeline is significant: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2015

Computer science graduation rates are increasing >2X more quickly in Virginia than U.S. average: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2010-2015

Much of our talent stays local: Zippia (2017), "Leaked State Secret: How to Stop the Brain Drain"

Between 2010 and 2016, Greater Richmond benefited from a net positive migration: U.S. Census Bureau (2010-2016 Migration Data, 2016 Population)

18 top schools are within a ~3hr drive radius of Greater Richmond: TomTom drive estimates

1.6M post-secondary students are located within 150 miles: U.S. Census Data, Greater Richmond Partnership Analysis

66% of Virginians age 20 to 40 live within a two-hour drive of Richmond, as well as 66% of the labor force: U.S. Census Bureau, 2016 American Community Survey

72% of Virginians with a bachelor's degree or higher live within a two-hour drive of Richmond: U.S. Census Bureau, 2016 American Community Survey

Applications and systems software developers earn \$70k and \$90k, respectively: Bureau of Labor Statistics, Occupational Employment Statistics 2016

Students who have passed an AP STEM exam: U.S. Chamber of Commerce Foundation (September 2014), "The States Need to Step It Up on STEM"

Standards for student learning, achievement, and standardized testing: "HB 831 Standards of Learning; curriculum shall include computer science and computational thinking", 2016

Computer science course credits to satisfy state graduation requirements: "HB 1054 High school diploma course and credit requirements; computer science", 2014

Virginia also requires all secondary schools offer computer science. We've cleared certification pathways for computer science teachers: Code.org Virginia Fact Sheet (2017)

Local programs like the MathScience Innovation center and STEM Fair give teachers and students access to the latest scientific training: MathScience Innovation Center (2017)

We have sponsored experimental schools like CodeRVA: CodeRVA (2017)

Henrico was the first public-school system in the U.S. to implement a one-to-one computer-to-student laptop initiative: Henrico Citizen (2011)

The National Association of Counties has also recognized nine innovative programs at Henrico schools: Henrico Citizen (2017)

Henrico's Deep Run High School's robotics team won the world title for robotics: Richmond Times (2017)

Virginia is also proud to be home to 476,000 working veterans, the fourth- largest veteran workforce in the country: U.S. Census Bureau (2016)

More than 90,000 veterans live in the Richmond region: U.S. Census Bureau (2015); Greater Richmond Partnership analysis

Livability

Nearly 1.3 million people already call the MSA home, and that number is expected to grow to ~1.5 million by 2040: U.S. Census Bureau American Community Survey (2016) and Richmond Regional Transportation Planning Organization Socioeconomic Data

Second-fastest growing millennial population, with 14.9% growth (2010-2015): TIME (2017) "The 25 Cities Where Millennials are Moving"

Richmond, Virginia: 50 Best Places to Live in America: Men's Journal (March 2015)

Richmond has an extremely low cost of living – far lower than other MSAs, and 35% lower than Seattle: Cost of Living Index 2017

Home prices in Richmond are low, \$286,034 compared to Seattle's \$598,150: Greater Richmond Partnership; Cost of Living Index specified house (4+ bed, 2+ bath, 2,400 SF living space plus garage house on an ~8,000 SF lot; newly built and never lived in; in a good neighborhood)

Among the lowest median rents of large MSAs, at \$988 per month: U.S. Census Bureau, American Community Survey (2010-2015 five-year estimates)

Despite low prices, renters and homeowners in Greater Richmond are getting a lot of space for their rent/mortgage, with 90% of houses and apartments having patios, and 73% having two or more bathrooms: U.S. Census and Department of Housing and Urban Development 2013 Report

5% of houses are unoccupied within 40 minutes of Greater Richmond's potential HQ2 sites: Dun & Bradstreet (2017)

New construction is bringing state-of-the-art apartment complexes to the heart of Richmond's growing neighborhoods: Housing and Urban Development Housing Market Analysis 2016

Cities across the region are routinely ranked as some of the most LGBTQ-friendly: Time (January 2014), "And the Gayest City in the U.S. Is..."

Our local governments have been committed to promoting significant growth in the housing stock over the past decade: Virginia Housing Development Authority

The city also has an affordable housing density bonus in the zoning code and a tax abatement for developers who create affordable housing units within certain sectors of the city: City of Richmond (2017)

4,100 physicians, 19 acute care and specialty hospitals, and over 4,000 staffed beds nearby: Greater Richmond Partnership (2017)

VCU Medical Center, third-rated hospital in Virginia, is in the heart of the city and able to provide employees with cutting-edge care locally (nationally ranked in multiple adult/pediatric specialties): US News and World Report (2017)

Our education system continues to be a national leader, ranking No.8 in the country for college readiness: US News and World Report (2017)

Greater Richmond is home to 29 schools ranked 9/10 or above: Niche.com (2017)

Nine schools in Henrico, Chesterfield, and the City of Richmond are recognized nationally: U.S. News and World Report (2017)

Richmond is a highly diverse and integrated city: 38% nonwhite: U.S. Census Bureau, American Community Survey 2016

Greater Richmond residents speak over 38 languages: U.S. Census Bureau American Community Survey 2013

Richmond's percentage of nonwhite students is 8% higher than the rest of Virginia and 6% higher than the U.S. average: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2015

Non-public schools also prioritize diversity, with Greater Richmond housing the Third-Most Diverse Private High School in America: Niche.com (2017)

Richmond is the No.9 city for black entrepreneurs to start a business: Rollingout.com

Region was ranked in the top 10 "Under the Gaydar" LGBTQ Cities: Trivago (June 2017)

Virginia ranks No.3 nationally in lowest rates of violent crime and No.10 nationally in lowest rates of property crime: U.S. News and World Report (2017)

The Richmond MSA has a particularly low violent crime rate: ~38% below the national average: FBI Uniform Crime Statistics (2015)

No.1 for Food Travelers: National Geographic (2016, 2017)

Sixth-Best City for Brunch in the U.S.: Travel + Leisure (2016) "America's Favorite Cities for Brunch 2016"

"The South's Best Food Towns": Garden and Gun (October 2017)

Over ~2300 restaurants within a 40-minute drive of Richmond: Dun & Bradstreet (2017)

25 breweries, three cideries, three wineries, and two distilleries: Greater Richmond Partnership

Named one of the "Most Fun Cities in America": Business Insider

Nation's most playful region: KaBOOM (2017)

"Top 20 Most Vibrant Arts Communities in America": SMU.edu

"Top Music Meccas of the South": Convention South (2017)

"Best American Cities for Creatives": Thrillist

VCU's School of the Art's is ranked second in the country and offers the top advertising program in the country: U.S. News and World Report (2017)

Sixth-best historic destination in the U.S.: U.S. News and World Report (2012)

>100 historical/cultural sites within 40 minutes of Richmond: Dun & Bradstreet (2017)

Home to 27 Festivals: Greater Richmond Partnership (2017)

One of the 10 Historic Venues any music lover needs to visit: Altpress.com (2017)

170 parks (6,500 acres of local parkland) in addition to the 7,700-acre Pocahontas State Park: Greater Richmond Partnership (2017)

The James River Park System was named as the second-Best Urban Park: Blue Ridge Outdoors Magazine

No.4 "The Most Beautiful Botanical Gardens in the U.S.": Conde Nast Traveler (July 2017)

Business Climate

Save Amazon up to \$10B in rent and labor costs over a 10-year employment ramp-up: Bureau of Labor Statistics, Cushman & Wakefield

Dominion Energy's rates for industrial customers are 34% below the U.S. average at 5.44 cent/kwh: Dominion Energy

Ranked No.6 top state to do business: Forbes, "Best States for Business 2016"

Ranked No.7 in CNBC's top states to do business: CNBC (2017) "Top States for Business"

No.3 for best regulatory environment: Forbes (2016), "Best States for Business: Virginia", <https://www.forbes.com/places/va/>

No. 3 for business-friendly environment: CNBC (2016), "America's Top States for Business 2016"

No.12 in nation for corporate HQ taxes: Tax Foundation 2017

Virginia has a 6% corporate income tax rate: Virginia Economic Development Partnership

Ambitious plans to reduce greenhouse gas emissions by 80% before 2050: RVA Green 2050

Eighth in the 2016 U.S. Green Building Council's top states for LEED: U.S. Green Building Council (January 2017), "U.S. Green Building Council Releases Annual Top 10 States for LEED Green Building"

Solar installations in the Commonwealth have increased: Virginia.gov (May 2017), "Governor McAuliffe Takes Executive Action to Reduce Carbon Emissions Across Virginia"

Virginia now ranks eighth in the 2016 U.S. Green Building Council's top states for LEED: U.S. Green Building Council (January 2017), "U.S. Green Building Council Releases Annual Top 10 States for LEED Green Building"

Solar installations in the Commonwealth have increased: Virginia.gov (May 2017), "Governor McAuliffe Takes Executive Action to Reduce Carbon Emissions Across Virginia"

Expected to meet Virginia's goal of 15% power coming from renewables by 2025: Dominion Energy

Dominion would add at least 990 megawatts of solar power capacity by 2022...: Dominion Energy power plan through 2042

Greater Richmond is known for our resilience: University of California Berkeley: Building Resilient Regions

Ranked second for the quality of state administration: U.S. News & World Report, Best States Rankings 2017

Committed to maintaining AAA bond rating: Washington Post (2011); "Maryland, Virginia warned of risk to credit rating"

Eight Fortune 500 companies and 30 Inc. 5000 companies are now proud to call Greater Richmond home: Greater Richmond Partnership (2017)

>150 employers of more than 500 people: Hoovers

Twenty-nine new information technology or high- tech manufacturing...: Greater Richmond Partnership

Capital One's office in Richmond has >11,000 employees: Greater Richmond Partnership

General Electric and Northrop Grumman also have 500+ employee footprints: Greater Richmond Partnership

Virginia is ranked the No.7 most innovative state by Forbes: Forbes (2017) "The 10 Most (And 10 Least) Innovative States In The U.S."

Open for business to testing connecting and autonomous vehicles: Virginia.gov (May 2017), "Governor McAuliffe Announces Establishment of Commonwealth's Autonomous Systems Center of Excellence"

>One startup for every 1,000 residents: Activation Capital 2016 Metrics Report (2016)

Top 10 up-and-coming city for entrepreneurs: Forbes (2013) "10 Up And Coming Cities for Entrepreneurs"

'8 Cities Whose Entrepreneurship Communities are booming: Entrepreneur.com (2017), "8 Cities Whose Entrepreneurship Communities Are Booming"

Top 20 places to start a business: CNBC (2016), "The Top 20 Metro Areas to start a Business in America"

Bio+Tech Park information: Activation Capital (2017)

No.12 on the communities that most resemble the U.S. (of peers) and #18 overall: WalletHub (2016), "2016's Metro Areas That Most and Least Resemble the U.S."

Our city still has plenty of room to grow: Richmond Land Use, Housing, and Demographic Study 2017; Henrico County; Chesterfield County

Connectivity

48.2% fiber coverage: BroadbandNow (2017),
"Fiber-Optic Internet in the United States"

Access to wired broadband 100mbps or higher:
BroadbandNow (2017), "Fiber-Optic Internet in
the United States"

No. 2 best city for cell phone service:
Rootmetrics (2017)

No.1 in call performance: Rootmetrics (2017)

No.2 in reliability: Rootmetrics (2017)

18,700 lane miles: Virginia Department of
Transportation

43% of the population is within a one-day drive
(10 hours) and 55% of the U.S. population lies
within a 750-mile radius: Virginia Department of
Transportation

\$75 million per year state commitment to
maintaining high quality highways in the region:
Virginia Department of Transportation

FY18-23 Virginia Six-Year Improvement Program
identifies ~\$970 million in planned spending for
transportation improvements in the Richmond
District: Virginia Department of Transportation

17 routes to NYC: Diio

~4x daily routes to Dulles International:
Richmond International Airport

One of the seven "awe-inspiring train stations
across America": Business Insider (2017)

Would reduce travel time to ~2 hours, provide
trips in each direction every ~45 minutes,
support 15% improvement in reliability, and
create 90% on-time performance: Virginians for
High Speed Rail (2017)

Increase service by 400%, reduce trip time to
five hours and increase reliability to 90% on-
time travel: Virginians for High Speed Rail (2017)

Only U.S. East Coast port with Congressional
authorization for 55-foot depth channels: Port of
Virginia (2017)

Third-largest port on the East Coast (in cargo
volume); Port of Virginia (2017)

Top five ports in North America: CBRE, The
Virginian Pilot, "Port of Virginia now ranks
among top five biggest ports in North America"

Increase its population to 1.5M residents:
Richmond Regional Transit Planning
Organization Socioeconomic Data (2012)

\$3.2 billion over the next 20 years for
transportation improvements: Virginia
Department of Transportation

More than 80 miles of bikeways: Virginia
Department of Transportation

\$23M in bicycle and pedestrian facilities
over the next six years and another \$110M
to the year 2040: Virginia Department of
Transportation

Lowest congestion rate of any large city in
the U.S. (populations of 1-3M) with peak traffic
congestion of only 16%: Urban Mobility Report
(Texas A&M Transportation Institute)

25-minute average commute time: U.S. Census
Bureau American Community Survey 2016

Increase population and jobs near transit lines
by ~75%, while quadrupling population access
to high-speed transit [& sub-bullets]: Virginia
Department of Transportation and Greater
Richmond Transit Company